The Signature Plan TM

A concierge-level plan that coordinates every part of your financial life in one place.

Investment Oversight & Strategy

- Review holdings and build a diversified, goal-aligned portfolio.
- Ongoing monitoring of performance and risk, with regular check-ins.
- Rebalance and adjust strategy as markets and life change.
- Guidance for 401(k), 403(b), 457, and self-directed accounts.

Retirement Income & Strategy

- Analyze income needs and build a long-term distribution plan.
- Coordinate Social Security, pensions, and withdrawals efficiently.
- Rebalance and adjust strategy as markets and life change.
- Stress-test key scenarios to stay confident in market cycles.

Tax Reduction Planning

- Review tax returns for opportunities and risks.TM
- Plan Roth conversions and tax-smart withdrawals.
- Coordinate with your CPA to align planning and filing.
- Track tax law changes that may impact you.

Additional Solutions

- Estate & Legacy Planning
- Capital Lending
- Risk Management
- Wellness & Lifestyle

Client Communication

- Quarterly insights and newsletter updates.
- Review meetings quarterly, semi-annually, or annually.
- Timely strategy updates on taxes, markets, and plan changes.
- Client events and educational updates to keep you engaged.

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