Gold Medal Services

"The New Standard in Personalized Wealth Management"

Investment "Oversight" Service

- Review of your investments and design of a personalized portfolio appropriate to your needs
- Continuous monitoring and quarterly rebalancing of your investment accounts.
- Independent advice
- Recommendations regarding positioning of funds within your employer-provided retirement plans, such as 401(k)s
- Being available to consult with you in all markets

Tax-Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for maximizing tax-reduction strategies
- Recommendations or tax solutions, including tax-advantaged investments and tax-loss harvesting (depending on the market cycle)
- Staying up-to-date on new tax laws and presenting those that can affect your situation

Retirement Income and Distribution Planning

- Analysis of your income needs now and for the future
- Continual development and implementation of recommendations for funding your income needs to maintain a comfortable standard of living
- Recommendations regarding the best distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA

Family Wealth Planning

- Analysis of your current estate plan and concerns
- Assistance in transferring assets to your Living Trust or other trust
- Guidance provided in the event of the death of a loved one

Client Communication

- Annual meetings to review and evaluate your investment performance, update your overall financial needs and goals and discuss your top concerns for the year. Reallocate your portfolio as agreed upon by you if necessary
- Help you avoid emotion driven financial mistakes
- Quarterly newsletter detailing our firm's research, analysis, and view of the current state of the investment markets
- Special Gold Medal Services events

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