

# OMNI Investment Services Suite



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Separate from the financial plan and our role as financial planner, we may recommend the purchase of specific investment or insurance products or accounts. These product recommendations are not part of the financial plan and you are under no obligation to follow them. 3102377 DOFU 6/2020

\* Additional services available for an hourly consulting or fixed fee.

## Core Investment Management

**Under \$1,000,000  
 in Investable Assets**

- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

## Additional Services

- Financial plan development
- Financial plan updates



## Financial Planning

**\$1,000,000 - \$3,000,000  
 in Investable Assets**

### Fee Based Financial Plan includes:

- Comprehensive financial plan
- Retirement needs analysis
- Income distribution strategies
- Investment planning including education funding
- Tax planning
- Protection Planning
- Current financial position analysis
- Estate planning services

### Additional Benefits

- Consolidated online account access
- Secure e-document organizer
- Semi-annual in person review meetings
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

### Creating a financial plan entails:

- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review

## Additional Services

- Financial plan updates

## Specialized Financial Planning

**\$3,000,000 +  
 in Investable Assets**

### Fee Based Personal or Business Financial Plan includes:

- Comprehensive financial plan
- Education planning and funding
- Retirement planning
- Tax planning
- Protection Planning
- Current financial position analysis
- Estate planning services
- Business financial planning

### Additional Benefits

- Consolidated online account access
- Secure e-document organizer
- Strategic planning for wealth conservation
- Detailed cash flow for retirees or near retirees
- Quarterly in person review meetings
- Charitable gifting strategies
- Trust creation and asset integration
- Tax-optimized investing and giving
- Executive compensation planning for:
  - Deferred compensation
  - Stock options
  - Concentrated portfolios
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting

### Creating a financial plan entails:

- Goals and objectives review
- Custom analysis of risk tolerance
- Overall net worth analysis
- Cash flow and budget review

## Additional Services

- Annual financial plan updates