OMNI Investment Services Suite

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* *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

OMNI
FINANCIAL SERVICES

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