



CLIENT SERVICE MODEL

	Offerings	Platinum	Premier	Select	Foundation
Delivery	Number of In-Person Meetings Available	6	4	2	1
	Number of Outbound Communications	As Needed	12	4	1
	Meeting Location	All Meetings Client's Choice	All Meetings Client's Choice	1 Financial Professional Office or Virtual 1 (Client Choice)	Financial Professional office or Virtual
	Client Advisory Board Member Seats available	3	2	1	0
Service	Investment Solution – AMP	Customized	Customized	Standardized Asset Allocation Model	Model Portfolio
	Investment Solution – Models	UMA	UMA	Model Portfolio	Model Portfolio
	Performance Reporting	Quarterly	Quarterly	Semi-Annual	Annual
		\$2M+	\$1M - \$2M	\$500K - \$1M	\$300k - \$500K
Service	Scope of Consulting & Planning	Comprehensive Planning + Coordination with In-House or Outside Services (e.g. Attorney, CPA)	Comprehensive Planning + Coordination with In-House or Outside Services (e.g. Attorney, CPA)	Comprehensive Planning	Accumulation/Decumulation Only
	Financial / Consulting Hours*	On-Going	8	6	3
	Assistance with Outside Professionals	Concierge Service with In-Person involvement	Concierge Service with In-Person involvement	Analyze In-house, then referral	Referral
	Access to On-Demand Reporting	Yes	Yes	Yes	No
	Fees	1% of Combined Income And/Or \$0.25 of Net Assets	\$400/mo	\$325/mo	\$250/mo

*Additional hours are billed at \$250 an hour

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