

Personal Wealth Management Engagement Platforms

How We Help | Our Approach



**PLAN DESIGN
& PLAN MANAGEMENT**

SERVICES

Comprehensive Financial Plan Design and Consultation.

Personalized Wealth Plan Implementation and Management.

Plan Oversight, Review, and Progress Reporting.

Strategic & Tactical Advisory, Refinements, and Guidance.

PRICING

- Consultation Rate
- Plan Design Fee
- Annual Engagement Fee



**INVESTMENT ADVISORY
& WEALTH MANAGEMENT**

SERVICES

Investment Advisory and Account Management.

Securities Analysis and Selection.

Comprehensive Financial Plan Design and Consultation.

Personalized Wealth Plan Design, Implementation, and Management.

PRICING

- Transaction cost with Annual Engagement Fee
- All-Inclusive Management Fee (*)



**PORTFOLIO MANAGEMENT
& WEALTH MANAGEMENT**

SERVICES

Personalized Portfolio Construction & Management.

Securities Analysis and Selection.

Comprehensive Financial Plan Design and Consultation.

Personalized Wealth Plan Design, Implementation, and Management.

PRICING

- All-Inclusive Management Fee (*).

*Based on Assets Under Management (AUM)

