



Planning/Service	Professional	Executive	Family Office
Advisory			
Financial Coach and Quarterback	X	X	X
Personal CFO		X	X
White Glove Treatment			X
Financial Planning			
Planning	X	X	X
Monitoring	X	X	X
Implementation	X	X	X
Investment Management			
Investment Policy Statement	X	X	X
Investment Analysis	X	X	X
Portfolio Construction	X	X	X
Monitoring	X	X	X
Reporting	X	X	X
Income Tax Planning			
Tax Advice and Projections		X	X
Tax Preparation			X*
Family Office			
Cash Flow Planning	X	X	X
Accounting and Bill Paying			X
Transaction Coordination			X
Business Valuation			X
Real Estate Consulting			X
Retirement Planning			
Lifestyle and Cash Flow Analysis	X	X	X
Pension and Social Security Analysis	X	X	X
Retirement Plans	X	X	X
Executive Benefits Analysis		X	X
Family Advisory			
Family Constitution			X
Personal Finance Education			X
Generational Planning			X
Estate & Trust Planning			
Estate Planning Review	X	X	X
Generational Planning			X
Implementation			X
Insurance & Risk Management			
Life Insurance Review	X	X	X
Property and Casualty Analysis			X
Philanthropy			
Charitable Giving Planning		X	X
Charitable Vehicles			X