Investment Management

Have there been any significant changes in your life or the general economic picture that might require adjustments in your investment strategy? How long ago have you updated your risk profile and allocated your portfolio according to your risk tolerance? Are your investments still on track to accomplish specific goals? If adjustments should be made, how can your taxes be minimized? Can you see all of your accounts by logging into a single website?

These services are offered on quarterly basis for clients who have completed the **Investment Strategy Review**:

- FinaMetrica Risk Profile – updated every three years
- Update Prioritized Goals with
  - Time frame
  - Money needed
- Feasibility Analysis for achieving goals
- Comment on Market and Economic Conditions
- Review of Account Statements & Activity
- Review of the Investment Policy Statement
- Discussion of Income Tax Control Options
- Recommended Adjustments
- Quarterly Report Includes:
  - Goal Summary and Feasibility Analysis
  - Current Balance Sheet
  - Portfolio Asset Allocation

This service includes unlimited access to planning software aggregated daily with institutions where accounts are held.

Why not verify that your investments are remaining positioned as effectively as they should be by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time?

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!