KIRTLAND
FINANCIAL MANAGEMENT INC

CLIENT SERVICE MATRIX

$500,000- under $1,000,000

Investment Management

- Investment Policy Statement
- Basic Goal Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Annual Reviews – Face-to-Face or GoToMeeting (web-based)
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts (For additional fee)

$1,000,000- $2,000,000

Comprehensive Financial Planning

Investment Policy Statement
Comprehensive Goal Planning and Monitoring
Quarterly Performance summary reports
Capital Gains Tax Planning
Beneficiary Review for RJ Retirement Plans
Semi Annual or Annual Reviews – Face-to-Face or GoToMeeting
IRA distribution planning
Newsletters and Market Insight
Advice on outside 401(k) accounts
All-inclusive account aggregation of external holdings
Work with CPA to provide year-end tax documents
Assistance in reviewing Insurance strategies
Financial Life Organizer
Education and Gifting Strategies
Long Term Care Planning
Processing Class Action Suit paperwork

Over $2,000,000

Comprehensive Wealth Management

Investment Policy Statement
Comprehensive Goal Planning & Monitoring
Quarterly Performance summary reports
Capital Gains Tax Planning
Beneficiary Review for RJ Retirement Plans
Quarterly, Semi, or Annual Reviews – Face-to-Face or GoToMeeting
IRA distribution planning
Newsletters and Market Insight
Advice on outside 401(k) accounts
All-inclusive account aggregation of external holdings
Work with CPA to provide year-end tax documents
Assistance in reviewing Insurance strategies
Financial Life Organizer
Education and Gifting Strategies
Long Term Care Planning
Processing Class Action Suit paperwork
Digital Document Organizer/Online Vault
Charitable planning strategies
Coordinate and attend meetings with family and other advisors
After-hours access to KFM staff