

# 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