GOLD MEDAL Services

Your Current Firm	PPF	Income Tax Planning
☐	☑	Comprehensive analysis of your tax return
☐	☑	Annual tax projection
☐	☑	Proactive tax planning to minimize taxes over your lifetime
☐	☑	Roth conversion strategies
☐	☑	Staying up-to-date on changes in tax laws

		Comprehensive Retirement Planning
☐	☑	Ongoing analysis of your current and future income needs
☐	☑	Distribution strategies
☐	☑	Social Security and pension claiming strategies
☐	☑	Review of your long-term care needs

		Investment Planning
☐	☑	Devise a tailor-made investment program
☐	☑	Diversify assets, styles of investing, and tax attributes
☐	☑	Aggregation of all of your accounts to simplify and reduce paperwork

		Next Generation Wealth Planning
☐	☑	Analysis of your current estate plan and concerns
☐	☑	Creation or revision of legal estate planning documents
☐	☑	Assist with transferring assets to your Living Trust or other trusts
☐	☑	Provide guidance with the appropriate and necessary steps in the event of the death of a loved one
☐	☑	Review of beneficiary designations and asset titling
☐	☑	Inherited IRA Trust planning

		Client Services and Communications
☐	☑	Newsletters and timely emails to help reassure, educate, and build stronger connections through market volatility
☐	☑	Quarterly market updates to keep you apprised of broad market activity and outlook
☐	☑	Comprehensive review meetings and an open-door policy
☐	☑	Special Gold Medal Service Events (including client education and appreciation events)
☐	☑	Fiduciary Relationship with focus on financial clarity

PARK PLACE
FINANCIAL