Jim Christian INC. Navigating Your Retirement **Our Service Level Platforms**	**Gold** For these clients, a higher level of assets requires a more sophisticated policy and our highest level of interaction. Through our Comprehensive Wealth Management process, we create and implement a customized investment policy appropriate to your asset level and needs. We provide regular communication and **top-priority response** to service needs and scheduling requests, quarterly net worth statements, and quarterly consultations if desired.	**Silver** For these clients, an intermediate level of assets requires an appropriate policy and a higher level of interaction. Through our Comprehensive Wealth Management process we create and implement a customized investment policy appropriate to your asset level and needs. We provide regular communication and **rapid response** to service needs, accommodation of scheduling requests when possible, semi-annual net worth statements, and semi-annual consultations if desired.	**Bronze** We educate clients on our Comprehensive Wealth Management process and either create, implement and/or service investments or life, paycheck, or long term care insurance appropriate to your needs. We provide regular communication and **timely response** to service needs, annual net worth statements and annual consultations <u>limited to the investments and/or insurance under our care.</u>
Ongoing Communication/Interaction	♦	♦	♦
Quarterly Newsletter	♦	♦	♦
Educational Workshops	♦	♦	♦
Annual Review	♦	♦	♦
Desk Calendar	♦	♦	♦
Tax Reports	♦	♦	♦
Birthday Letter	♦	♦	
Comprehensive Planning (see other side)	♦	♦	
Retirement Party	♦	♦	
Client Appreciation Events	♦	♦	
Client Advocate Events	♦	♦	
Semi-Annual Review Available	♦	♦	
Quarterly Review Available	♦		
Elite Events	♦		
All clients are valued and appreciated!	*For those who... ...want to develop and implement a sophisticated and personalized Comprehensive Wealth Management program that is most appropriate for clients who could benefit from up to 2 hours per month of service and desire the **highest level** of ongoing interaction with their financial service professional.*	*For those who... ...want to develop and implement a Comprehensive Wealth Management program that is most appropriate for clients who could benefit from up to 2 hours per quarter of service and desire an **intermediate level** of ongoing interaction with their financial service professional.*	*For those who... ...want to develop and implement a Limited Wealth Management program that is most appropriate for clients who could benefit from up to 2 hours per year of service and desire a **basic level** of ongoing interaction with their financial service professional.*

Comprehensive Planning

Cash Flow	Risk Management	Investment Planning	Estate Planning and Charitable Giving	Retirement Planning	Income Tax Planning	Legacy Planning	Business Planning
Inflows and Outflows	Review Current Life Policies	Portfolio Review	Power of Attorney	Retirement Goal Setting	Annual Income Tax Review	End of Life Planning	Succession Planning
Emergency Funding	Assess Life Insurance Needs	Asset Allocation	Health Care Directives & HIPPA Forms	Social Security And Medicare	Review Realized Gains	Review Beneficiary Designations	Key Person Insurance
Debt Management	Assess Long Term Care Needs	Liquidity Analysis	Wills	Document Storage Identity Protection	Carry Forward Losses	Elder Care	Executive Bonus Planning
Life Transitions and Event Planning	Assess Disability Income Needs	Withdrawal Strategies	Trusts	IRA Contributions & Conversions	Tax Loss Harvesting	College Savings Planning	Deferred Compensation Planning
Planned Large Expenses	Assess Critical Illness	Investment Policy Statement	Guardians for Minor Children	Employer Sponsored Plans	Deductions and Credits	UGMA/UTMA	Qualified Benefit Planning
Mortgage Review	Health Insurance Review Needs	Written Financial Plan	Titling Assets Individual/Joint	Annuity Review	Potential Roth Conversions	Roth IRA's For Children	Employee Benefits Planning
Lines of Credit	Review Home, Auto & Personal Lines Insurance	Review Investments Outside of Our Firm	Estate Taxes	RMD's and Withdrawal Strategies	Health Savings Flexible Spending Accounts	Gifting	Assess Workers Comp Commercial Lines Insurance
		Dollar Cost Averaging	Charitable Giving And Trusts	Self-Employed Retirement Plans	Cost Basis Review	Special Needs Family Member	
						The Beneficiary Book/Ethical Wills	
						Longevity Planning Bucket List	

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Navigating Your Retirement

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Concierge Service

We can recommend credentialed professionals such as an attorney, tax preparer/CPA, banker and medical insurance broker, etc. If you already have your own professionals, we work collaboratively with them for our client's best interests.