Personalized *Gold Medal Services*
The New Standard in Wealth Management

At Elliott Wealth Management Services, LLC, clients come first!

Our approach to delivering comprehensive financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver a customized plan along with your personal ***Financial Action Checklist***. Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment planning, tax reduction planning, retirement income and distribution planning, and family wealth planning.

Some of the ways we differ from other firms:

- ✓ Our strong menu of **Gold Medal Services** which include a comprehensive review of your: tax reduction strategies; estate plans; investment plans; retirement plans; and, protection plans.
- ✓ Complimentary access to powerful Financial Planning software to track your financial goals, net worth and establish a budget
- ✓ Upgradable Lifetime access to the Financial Planning software with additional tools and features such as Advanced Retirement, Tax, and Estate Projections, Education Planning, Advanced Debt Management tools, and Collaboration Features.
- ✓ Our frequent and regularly scheduled meetings with clients to update your specific plans and discuss your personal situations.
- ✓ Our strong and consistent calendar of high-quality newsletters, tax reports, and other reports and articles.
- ✓ Our frequent schedule of client educational and appreciation events.
- ✓ Our personal service that features our best and most current ideas, suggestions and solutions.

Compare our list of *Gold Medal Services* *to the services you receive today*

Your Current Firm	Elliott Wealth Management	Investment Oversight Service
☐	☑	Reviewing your investments and designing a personalized portfolio appropriate to your needs
☐	☑	Continual monitoring of your investments
☐	☑	Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your portfolio
☐	☑	Quarterly Statements
☐	☑	Independent Advice
☐	☑	Recommendations regarding allocations within your employer provided retirement plans such as 401(k)s
☐	☑	Aggregation of all your accounts to simplify and reduce paperwork

Tax Reduction Planning

☐	☑	Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies
☐	☑	Quarterly review of your tax situation and planning to incorporate any new tax law changes
☐	☑	Complimentary consultation with your tax preparer
☐	☑	Recommendations of tax solutions including tax advantaged investments
☐	☑	Staying up to date on and presenting new tax laws that can affect your situation

Retirement Income & Distribution Planning

☐	☑	Analysis of your income needs now and, in the future,
☐	☑	Analysis of potential estate tax liabilities
☐	☑	Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
☐	☑	Recommendations regarding the most appropriate distribution strategy for your employer retirement plans & IRAs
☐	☑	Analysis of the beneficiaries of your IRAs
☐	☑	Review the possibilities of converting to a Roth IRA

Family Wealth Planning

☐	☑	Analysis of your current estate plan and concerns
☐	☑	Complimentary consultation with your attorney
☐	☑	Assistance in transferring assets to your Living Trust or other trusts
☐	☑	Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
☐	☑	Review of beneficiary designations and asset titling
☐	☑	Review of your long-term care needs.

Client Services & Communications

☐	☑	Quarterly Newsletter to keep you apprised of the most current planning options
☐	☑	Quarterly, semi-annual or annual reviews
☐	☑	Special reports on how to help reduce your taxes and other important topics
☐	☑	Special Gold Medal Service Events (including client education and appreciation events)