ARGENT BRIDGE ADVISORS

CONNECTING UNCERTAINTY WITH CLARITY

SERVICE LEVELS

Services not included in a given service plan can be included for an additional fee.

CORE

Protected, Solid, Long-Lasting

Investment Assets
$1,000,000 - $2,500,000

- ✓ Financial Planning
- ✓ Asset Management
- ✓ Budget Review & Analysis
- ✓ Financial Education

EXTENDED

Reinforced, Structured, Well-Supported

Investment Assets
$2,500,000 - $5,000,000

- ✓ Financial Planning
- ✓ Asset Management
- ✓ Budget Review & Analysis
- ✓ Financial Education

PLUS

- ✓ **Distribution Strategies**
- ✓ **Insurance & Risk Planning**
- ✓ **Tax Strategies**

COMPREHENSIVE

Complex, Anchored, Carefully Arranged

Investment Assets
greater than $5,000,000

- ✓ Financial Planning
- ✓ Asset Management
- ✓ Budget Review & Analysis
- ✓ Financial Education
- ✓ Distribution Strategies
- ✓ Insurance & Risk Planning
- ✓ Tax Strategies

PLUS

- ✓ **Trust & Estate Services**
- ✓ **Concierge Services**

CORE

Protected, Solid, Long-Lasting

Clients with investment assets between
$1,000,000 - $2,500,000

Periodic Review: **Semi-Annually**

FINANCIAL PLANNING

- Wealth Building Strategies
- Retirement Income Distribution Modeling
- Account Consolidation
- RMD Calculations
- Tax Planning
- Education Funding Planning
- Notary Services
- Guaranteed Signature Service

ASSET MANAGEMENT

- Investment Management Strategies
- Investment Asset Allocation Analysis
- Investment Research and Due Diligence
- Client Aggregation Platform
- Portfolio Rebalancing

BUDGET REVIEW & ANALYSIS

- Budget Analysis
- Debt Elimination Strategies
- Mortgage Review
- Annual Credit Report Guidance

FINANCIAL EDUCATION

- Risk Management Strategies

EXTENDED

Reinforced, Structured, Well-Supported

Clients with investment assets between
$2,500,000 - $5,000,000

Periodic Review: **Semi-Annually**

FINANCIAL PLANNING

- Wealth Building Strategies
- Retirement Income Distribution Modeling
- Account Consolidation
- RMD Calculations
- Tax Planning
- Education Funding Planning
- Notary Services
- Guaranteed Signature Service
- Ongoing Financial Planning
- Planning for Life Events
- Net Worth Analysis/Detailed Net Worth Statement
- Estate Planning Review and Implementation
- Corporate Benefits Review
- Family/Generational Meetings

ASSET MANAGEMENT

- Investment Management Strategies
- Investment Asset Allocation Analysis
- Investment Research and Due Diligence
- Client Aggregation Platform
- Portfolio Rebalancing
- Advice on Assets Not Managed

BUDGET REVIEW & ANALYSIS

- Budget Analysis
- Debt Elimination Strategies
- Mortgage Review
- Annual Credit Report Guidance

FINANCIAL EDUCATION

- Risk Management Strategies
- Long-Term Care Planning
- Medicare Planning

DISTRIBUTION STRATEGIES

- Retirement Planning Scenarios
- Social Security Planning
- Advanced Cash Flow Analysis

TAX STRATEGIES

- Executive Compensation Evaluation

COMPREHENSIVE

Complex, Anchored, Carefully Arranged

Clients with investment assets greater than $5,000,000

Periodic Review: **Quarterly**

FINANCIAL PLANNING

- Wealth Building Strategies
- Retirement Income Distribution Modeling
- Account Consolidation
- RMD Calculations
- Tax Planning
- Education Funding Planning
- Notary Services
- Guaranteed Signature Service
- Ongoing Financial Planning
- Planning for Life Events
- Net Worth Analysis/Detailed Net Worth Statement
- Estate Planning Review and Implementation
- Corporate Benefits Review
- Family/Generational Meetings
- Multi-Generational Planning

ASSET MANAGEMENT

- Investment Management Strategies
- Investment Asset Allocation Analysis
- Investment Research and Due Diligence
- Client Aggregation Platform
- Portfolio Rebalancing
- Advice on Assets Not Managed
- Access to Private Placements & Alternative Investments

FINANCIAL EDUCATION

- Risk Management Strategies
- Long-Term Care Planning
- Medicare Planning

BUDGET REVIEW & ANALYSIS

- Budget Analysis
- Debt Elimination Strategies
- Mortgage Review
- Annual Credit Report Guidance

INSURANCE & RISK PLANNING

- Risk Management Strategies
- Long-Term Care Planning
- Medicare Planning
- Liability Planning/Risk Review

DISTRIBUTION STRATEGIES

- Retirement Planning Scenarios
- Social Security Planning
- Advanced Cash Flow Analysis

TAX STRATEGIES

- Executive Compensation Evaluation
- Charitable Planning Services

TRUST & ESTATE SERVICES

- Estate Settlement
- Trust Review Services

CONCIERGE SERVICES

- Vetted Professional Services
- Meeting with Attorney(s) – as needed
- Lending Needs
- In-Person Meeting (regardless of location)
- Annual Meeting with CPA
- Business Continuation Planning
- Bookkeeping Services
- Invitation-Only Events

ARGENT BRIDGE ADVISORS

CONNECTING UNCERTAINTY WITH CLARITY

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