

COMMITMENT OF SERVICES FOR WEALTH MANAGEMENT CLIENTS

Most advisors only talk about the services they provide. At Gremler Financial Group, our wealth management team goes a step further by putting it in writing. Here are the services and resources you can expect and rely on from us, as part of YOUR team.

Initial and Ongoing Meetings

- A financial advisory team to coordinate tax, estate strategies, investment, and financial planning
- Fact finder and review
- Needs-based analysis on legacy planning, risk management and insurance review
- Review of tax plan and tax status to coordinate with investment allocations
- Personalized financial plan and proposal
- Personalized asset allocation and recommendations
- In-depth Morningstar reports and analysis
- Agreement to implement plan
- Ongoing review of plan
- Rebalancing of portfolio

Keeping You Proactively Informed & Organized

- Access to Albridge reporting (on-line, up-to-date access to your consolidated accounts)
- Statement reviews
- Monthly performance snapshot
- Quarterly meetings including an annual updated financial plan for your review
- Year end tax review and recommendations
- Coordination with CPA and attorney to help ensure estate plan and financial plan coincide
- Articles, calculators, newsletters, market information, e-seminars and more on www.GremlerFinancial.com to keep you abreast of the markets and contribute to your financial education

Access to Exclusive Events & Education

- Weekly e-mail updates on topics related to your financial well being such as the markets and economy, legislation, investments and more.
- Monthly invitations to speaking engagements on a variety of planning topics such as retirement planning, generating income, wills & trusts, long-term care, Medicare supplement, economic overview, investments and Social Security, to name a few.

Advisor(s) Name: _____

Client Name: _____

Advisor(s) Signature: _____

Client Signature: _____

Date: _____

Date: _____

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ADDITIONAL INFORMATION

We've Developed Relationships to Help Support Your Comprehensive Needs

