

# SERVICE OFFERINGS

## PROGRESSIVE FINANCIAL PLANNING (PFP)

## INVESTMENT MANAGEMENT (IM)

## WEALTH MANAGEMENT (WM)

This is for	Professionals & young families that want a solid financial plan in place.	Organizations, loyalty clients or in addition to PFP.	Those transitioning to or settled in retirement.
Financial Plan	Baseline Plan 2 modules	No Plan	Comprehensive Financial Plan
Financial Planning Modules	4/year		As Needed
Required Minimum Distribution Coordination		✓	✓
Quarterly Activity Statements	✓		✓
GWF Directed Investments		✓	✓
Performance Reporting		Annually	Quarterly
Portfolio Review		Annually	Quarterly
Capital Gains Reporting		✓	✓
WhealthCare Plan			✓
Legacy Planning			✓
<b>Communication</b>			
Client Educational Resources	✓	✓	✓
Accountability Contact	✓		✓
Monthly Newsletter	✓	✓	✓
CFP® Access	Phone, eMail		in-Person, Phone, eMail
Wheelhouse	✓		✓
Client Portal		✓	
<b>Internal</b>			
Investment Research & Review		Quarterly	Quarterly
Systematic Reallocating Analysis		✓	✓
Financial Planning Review	Quarterly		Monthly
Team Continuing Education	✓	✓	✓
<b>FEES</b>			
Initial	\$1000	N/A	\$2500
Monthly	\$200+	None	None
Quarterly	or \$600+	0.1875% of Managed Assets	The Greater of 0.1875% Managed Assets or \$1,250

### Modules

Cash Flow Management | Budgeting | Net Worth Analysis | Held Away Investment Review | Tax Planning | Real Estate Advice  
 Retirement Planning | Debt Management | Education Planning | Life Insurance Planning | Health Insurance Review  
 Home & Auto Insurance Review | Estate Planning | Estate Distribution | Qualified Charitable Distribution Coordination



**GWF** FINANCIAL, INC.

Planning your financial future. Growing your personal wealth.