Investment Management Only	Financial Plan Only	Seasonal Model Only
	Most Appropriate for Clients Who	
• Want investment advice, such as product selection & asset allocation	• Want a current picture of their financial status associated with their important goals • Want recommendations of solutions to accomplish specific goals	• Want an ongoing, fee based relationship that aligns their financial goals & values with their financial plan • Wish to take an active, collaborative role in the financial planning process to achieve a successful result
	Client Service Offering (annual)	
• 1-2 scheduled review meetings (in person or virtual) • Additional financial advisor engagement as necessary	• Scheduled meetings during the financial plan creation process only	• 4 scheduled meetings (in person or virtual) • Ongoing review of goals & personalized financial plan
	What You Can Expect	
• Annual review of performance • Analysis of investment portfolio • Review of recommendations, including risk tolerance, financial goals & investment mix PorteBrown® WEALTH MANAGEMENT	• Creation of initial financial plan with recommendations to achieve your goals	• Annual update of financial plan **Seasonal Planning Overview:** **Goal Tracking** – Review financial goals & progress **Asset Allocation** – Review & update risk tolerance & investment mix **Family Security** – Review cash flow, spending, insurance coverage, estate planning & employer benefits **Goal Tracking** – Review tax strategies, implications & options to manage tax liabilities