Avantax Seasonal Planning

Menu of Services

Peak Wealth Strategies offers an integrated, tax-centric approach to wealth management to help you achieve your financial goals. We work with you to preserve and grow your wealth by providing a high level of service and support throughout the planning process.

PEAK WEALTH STRATEGIES

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INVESTMENT MANAGEMENT ONLY	FINANCIAL PLAN ONLY	SEASONAL MODEL ONLY
Most Appropriate for Clients Who		
• Want investment advice, such as product selection and asset allocation, only	• 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 and values with their financial plan • Wish to take an active role in the financial planning process to help 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 and personalized financial plan
What You Can Expect		
• Annual review of performance • Analysis of investment portfolio • Review of recommendations, including risk tolerance, financial goals and investment mix	• Creation of initial financial plan with recommendations to achieve your goals	• Annual update of financial plan **Goal Tracking** — Review financial goals and progress **Asset Allocation** — Review and update risk tolerance and investment mix **Family Security and Cash Flow** — Review cash flow, spending, insurance coverage, estate planning and employer benefits **Tax Planning** — Review tax strategies, implications and options to manage tax liabilities

Avantax
Wealth Management℠