



Planning/Service	Professional	Executive	Family Office
<b>Advisory</b>			
Financial Coach and Quarterback	X	X	X
Personal CFO		X	X
White Glove Treatment			X
<b>Financial Planning</b>			
Planning	X	X	X
Monitoring	X	X	X
Implementation	X	X	X
<b>Investment Management</b>			
Investment Policy Statement	X	X	X
Investment Analysis	X	X	X
Portfolio Construction	X	X	X
Monitoring	X	X	X
Reporting	X	X	X
<b>Income Tax Planning</b>			
Tax Advice and Projections		X	X
Tax Preparation			X
<b>Family Office</b>			
Cash Flow Planning	X	X	X
Accounting and Bill Paying			X
Transaction Coordination			X
Business Valuation			X
Real Estate Consulting			X
<b>Retirement Planning</b>			
Lifestyle and Cash Flow Analysis	X	X	X
Pension and Social Security Analysis	X	X	X
Retirement Plans	X	X	X
Executive Benefits Analysis		X	X
<b>Family Advisory</b>			
Family Constitution			X
Personal Finance Education			X
Generational Planning			X
<b>Estate &amp; Trust Planning</b>			
Estate Planning Review	X	X	X
Generational Planning			X
Implementation			X
<b>Insurance &amp; Risk Management</b>			
Life Insurance Review	X	X	X
Property and Casualty Analysis			X
<b>Philanthropy</b>			
Charitable Giving Planning		X	X
Charitable Vehicles			X