illuminate
WEALTH MANAGEMENT

	One-Time Financial Projects	Investment Management Only	Complete Wealth Management
Duration of Service	4 to 6 Weeks	Ongoing Services	Ongoing Services
Number of Meetings	Two	Quarterly	Ongoing & Unlimited

Initial Planning Advice

	One-Time Financial Projects	Investment Management Only	Complete Wealth Management
Cash Flow Projeciton	✓	✓	✓
Basic Tax Planning	✓	✓	✓
Retirement Savings Review	✓	✓	✓
Current Investment Review	✓	✓	✓
Current Insurance Review	✓	✓	✓
Estate Planning Best Practices	✓	✓	✓
Chartable Giving Best Practices	✓	✓	✓
Written Recommendations	✓	✓	✓
Illuminate Professionals Network	✓	✓	✓

Proactive Review & Management

	One-Time Financial Projects	Investment Management Only	Complete Wealth Management
Cash & Savings Management		✓	✓
Ongoing Investment Management		✓	✓
ESG Investing with Funds		✓	✓
Individual Municipal Bonds		✓	✓
Tax Aware Investing		✓	✓
Financial Independence Planning			✓
Retirement Scenario Planning			✓
Proactive Tax Planning			✓
Roth Conversion Strategy			✓
Life & Disability Ins. Planning			✓
Property & Casualty Ins. Review			✓
Health Insurance Review			✓
Medicare Planning			✓
Social Security Maximization			✓
Employer Benefits Review			✓
Stock Option & RSU Planning			✓
Estate Plan Coordination			✓
College Planning			✓