Financial Planning Services Tailored to Our Advisors' Needs

Duncan
ADVISOR RESOURCES

High net worth clients expect a broader range of services from a financial advisor. Financial planning, wealth transfer, estate and tax planning are all services clients expect but are not delivered by a majority of advisors. Contact us today to learn how financial planning can help you deliver a comprehensive client experience, differentiates your practice and takes the client conversation beyond how the markets performed to how you can make a significant difference in their life and future.

Financial Planning Subscription

Appropriate for Advisors looking for Financial Planning advice, training, or questions.

» Assistance with CLIC Advisor, Foundation or Advanced Planning
» Assistance with CLIC Client
» Questions relative to Plans, including Data Entry, Needs Analysis, Goal Planner, Decision Center, Scenarios, Techniques, Reports or Delivery to Clients
» Access to DAR Financial Planning Resources, including Plan Analysis Template, Data Takers, and Marketing Material
» Review / Collaboration of Foundational or Advanced Plan

Monthly Subscription is $250 for 5 hours or **Quarterly Subscription** is $500 for 10 hours

Financial Planning Experience

Appropriate for Advisors looking for our Team to take care of the entire Financial Planning experience, including client delivery.

Comprehensive Financial Plan includes the following areas as needed:

» Dedicated Strategic Financial Analyst
» In-Depth Review and Analysis of:
- Goal and Objective Review
- Risk Tolerance
- Net Worth
- Cash Flow
- Savings / Budgeting Strategies
- Asset Allocation
- Risk Management
- Retirement Needs

» Customized Investment Policy Statement
» Income Distribution Strategies
» Risk Mitigation Strategies
» Tax Planning and Family Gifting Strategies
» Multi-Generational Planning and Gifting
» Charitable Gifting Strategies
» Business Owner and Succession Planning
» Coordination with Outside Professionals

Financial Plan cost dependent on level of complexity:

	Low Complexity	Medium Complexity	High Complexity
Advisor Cost	$1,500	$2,500	$3,500
Suggested Client Billing	$1,500 - $2,000	$2,500 - $3,500	$3,500 - $5,000