

Comprehensive Service Platform



FINANCIAL PLANNING

- + Organize finances and cash flow management
- + Identify and plan for life goals
- + Saving needs to fund lifestyle
- + Implement customized strategic plan
- + Ongoing risk management
- + Charitable giving
- + Multi-generational wealth transfer
- + Captive insurance companies
- + Consult on mortgage refinancing
- + Evaluate vacation properties
- + Consult with commercial and personal financing lenders
- + Planning for employee stock options
- + Review of employee benefits
- + Banking lending including line of credit and collateralized loans

INVESTMENTS

- + Quantify investment objective
- + Asset allocation strategies and rebalancing
- + Consolidated performance reporting
- + Investment manager evaluation and research
- + Retirement and non-retirement account allocation

TAX

- + Tax optimization and management by advising on taxes incurred when clients buy and sell assets
- + Advise on account type (IRA, ROTH, 529)
- + Advise on the timing of social security benefits

EDUCATION

- + Educational events featuring RFG Advisory's Chief Investment Officer Rick Wedell
- + Weekly, monthly or quarterly economic updates
- + Personal consultation available for each client's unique situation

RFG CLIENT PORTAL

- + Real time access to net worth, goals, financial plan via customized and interactive mobile-friendly client portal Fetch Financial Life Hub that aggregates all clients' information including assets not managed by advisor
- + Vault for organization of important documents

TRUST & ESTATE

- + Trust company or trustee selection
- + Coordinate communication with attorneys and CPAs
- + Estate planning
- + Lifetime gifting strategies

BUSINESS CONSULTING

- + Succession planning
- + Advise on family business dynamics and sale of family business
- + Advise on mergers and acquisition opportunities

INSURANCE

- + Evaluate which types and how much insurance is appropriate
- + Discuss and manage longevity risk and long-term

Your Top Priorities

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Securities offered through Private Client Services, member FINRA/SIPC. Investment advice offered through RFG Advisory, a Registered Investment Advisor. RFG Advisory and Private Client Services are unaffiliated entities.