EQUISTAR WEALTH MANAGEMENT

All-Inclusive Fee & Services

Planning

- Retirement goals
- Higher education
- Charitable giving strategies
- Estate planning
- Tax planning
- Insurance
- Business purchase, sale, or succession planning
- Healthcare and eldercare
- Spending and cash flow
- Coordination with outside advisors

Investments

- Articulating investment goals and strategies
- Custom portfolio design
- Active and/or passive strategy selection
- Selecting cost and tax efficient investments
- Risk analysis
- Meeting liquidity needs
- Rebalancing
- Tax-loss harvesting
- Ongoing investment monitoring

Ongoing Advice

- Quarterly consolidated portfolio reports
- Annual plan reviews
- In-person or virtual meetings
- Adjusting financial plan based on life events
- Intergenerational wealth education
- Bringing clarity to financial headlines
- Adhering to plan goals
- Navigating real estate transactions
- Debt management and cash flow / spending strategies
- Providing professional referrals
- Transition assistance
- Private or outside investment review

Assets Managed	Annual Fee
FIRST $1,000,000	1.00%
NEXT $2,000,000	0.80%
NEXT $2,000,000	0.60%
NEXT $5,000,000	0.35%
OVER $10,000,000	0.25%