DICKHOLTZ WEALTH MANAGEMENT

Strategies For Life

2565 Shermer Road Northbrook, IL 60062 www.DickholtzWM.com Phone: 847.272.1155 Fax: 847.272.1154

Gold Service	Silver Service	Bronze Service
Recommended for: • Clients who enjoy and desire the highest level of personal attention while working towards their financial goals. • Clients with investable assets of $1,000,000 or more.	**Recommended for:** • Clients who want a strategic financial plan with semi-annual progress meetings. • Clients with investable assets between $250,000 and $1,000,000.	**Recommended for:** • Clients who are new to the financial planning process and want to evaluate their progress annually. • Clients with investable assets under $250,000.
Discover		
• Discovery and Goal Definition Meeting • Personal assistance with Non-Brokerage Assets • DWM VIP Client Events • Annual Client Appreciation Event • Weekly Market E-Newsletter	• Discovery and Goal Definition Meeting • Guidance with Non-Brokerage Assets • Annual Client Appreciation Event • Weekly Market E-Newsletter	• Discovery and Goal Definition • Weekly Market E-Newsletter
Design		
Comprehensive Financial Plan: *(On-Going Plan Updates)* • Income Distribution Planning • Wealth Building Strategies • Detailed Net Worth Statement • Detailed Investment Planning • Retirement Planning • Cash Flow Management • Education Funding • Charitable Giving Strategies • Debt Elimination Strategies • Family/Generational Consulting and Planning • Insurance Review and Planning • Long Term Care Insurance Planning • Tax Review * • Estate Plan and Trust Review*	**Advanced Financial Plan:** • Income Distribution Planning • Wealth Building Strategies • Detailed Net Worth Statement • Detailed Investment Planning • Retirement Planning • Debt Elimination Strategies • Education Funding • Insurance Review and Planning • Tax Review * • Estate Plan and Trust Review * • Annual Plan Updates	**Standard Financial Plan:** • Wealth Building Strategies • Net Worth Statement • Investment Planning • Retirement Projection • Insurance Review • Optional: Hourly Consultation Services @ $200 per hour.
Implement		
• Managed Opportunities—Fee-Based • Manage Existing Investment Assets—Commission-Based • Insurance and Annuities • Professional Account Administration • Live collaboration with CPA and Attorney • Organizational Binder(s) • Discounted Asset Management Fees • Flexible Appointment Options	• Managed Opportunities—Fee-Based • Manage Existing Investment Assets—Commission-Based • Insurance and Annuities • Professional Account Administration • Phone collaboration with CPA and Attorney • Organizational Binder • Weekday Appointments with some flexibility	• Managed Opportunities—Fee-Based • Manage Existing Investment Assets—Commission-Based • Insurance and Annuities • Weekday Appointments
Monitor		
• Dickholtz Wealth Management, Inc. Website Tools • Online Account Access • Unlimited Priority Phone Consultations • Quarterly Performance Review • Quarterly Plan Review and Goal Tracking	• Dickholtz Wealth Management, Inc. Website Tools • Online Account Access • Scheduled Priority Phone Consultations • Semi-Annual Portfolio and Goal Review	• Dickholtz Wealth Management, Inc. Website Tools • Annual Portfolio and Goal Review