High Net Worth Clients Can Expect the Following Communications

- Investment Management through Betterment INSTITUTIONAL
- Quarterly Updates about Account
  - Quarterly email from Dan about account performance and recommendations
- Monthly Newsletter delivered to your inbox. Information included:
  - Links to Latest Blog Posts
  - Well-Rounded Success Upcoming Events
  - Financial Tips
  - Inspirational Quotes
  - Corny Jokes ☺
- Financial Planning
  - Dan will create a goals-based plan and provide resources, guidance, and/or connections to your questions about your personal finances
    - Please see the back of this page to see possible topics
  - Once a goals-based plan is created, Dan will check-in monthly to ensure the plan is being followed and updating the plan if needed

Please contact Dan if you have any questions

Well-Rounded Success Financial Planning Topics

Work with Dan to create a plan to tackle these topics in the Well-Rounded Financial Planning Model

Bedrock

Cash Flow Management
Emergency Savings
Basic Insurance
Health Savings
Retirement Planning
Investments
Credit, Loans, & Debt
Automatic Saving

Community

Taxes
Charitable Giving
Estate Planning

Career

Career Development
Income Planning
Employee Benefits
Continuing Education
Investing in Yourself

Relationships

Beneficiaries
P.O.D. & T.O.D.
Estate Planning
College Savings
Life Insurance
Advance Directives
Will & Probate
Aging Loved Ones
Legacy Planning

Soul

Fun Money
Psychology with Money
Vacations
Hobbies
Financial Goals
Life Stages