ProActive Advisors LLC "Who's Watching Your Money?"

FEE FOR SERVICES DESCRIPTION

Your choice of a Financial Advisor is likely the most important financial decision you will make. That's because your choice determines your investment costs, security selection, diversification, asset allocation, and tax efficiency. In short it determines your financial security. At ProActive Advisors we work under a Fiduciary standard of care. We work for your best interests.

WEALTH MANAGEMENT .50% - 1.25% Annually on a Declining Scale

An on-going, financial engagement that includes Financial Planning, Retirement Planning, Tax & Estate Planning, and Investment Management services. This '*White Glove*' engagement contrasts with the services below that are one-time or as you want them engagements and do not include on-going investment monitoring & implementation, comprehensive financial planning notably: Social Security Maximization, Tax Planning, Business Consulting, and Estate Planning, nor proactive Risk Management of retirement & investment accounts.

While all financial engagements provided by ProActive Advisors are performed under a Fiduciary standard of care, our Wealth Management engagement provides anytime access without additional fees and includes implementation of financial advice for all your retirement and savings accounts.

Fees for Wealth Management are negotiable and priced based on the complexity of your financial life and on the assets under our management (AUM). Fees decline as your account value increases. For more details, access our Firm Brochure at the bottom of any page on this website.

FINANCIAL CHECK-UP AND SECOND OPINION $750

- ✓ Discovery Consultation
- ✓ Account(s) Review
- ✓ "GPS" Guidance
- ✓ Retirement Advice
- ✓ Risk Assessment
- ✓ Guidance on 401K, 403b, 457, TSP
- ✓ Annuity Evaluation
  Ltd Partnership Evaluation
  Private Equity Evaluation
- ✓ Written Report
- ✓ 30 Day Support after report delivery

- X Portfolio Monitoring
- X Portfolio Implementation
- X Financial Planning
- X Estate Planning

Popular with those seeking objective advice about their financial health, pre-planning retirement, how they are investing, or the appropriateness of financial product recommendations.

RETIREMENT PLAN MAINTENANCE ENGAGEMENT $1,750

- ✓ Discovery Consultation
- ✓ Account(s) Review
- ✓ Performance Evaluation
  - Cost Analysis
  - Security Selection
  - Diversification
  - Asset Allocation
  - Risk Assessment
  - Guidance to combat portfolio risks
- ✓ Guidance on 401K 403b, 457, TSP
- ✓ Roth Conversions
- ✓ Written Financial Plan
- ✓ One-time Implementation
- ✓ 30 Day Support after report delivery

- X Portfolio Monitoring
- X On-going Implementation
- X Estate Planning

Popular with those desiring a flat-fee-for-service arrangement and periodic, comprehensive financial planning on their time schedule.

ON-TRACK FINANCIAL HEALTH ENGAGEMENT $2,500

- ✓ Financial Planning
- ✓ Portfolio Review
- ✓ Performance Evaluation
  - Cost Analysis
  - Security Selection
  - Diversification
  - Asset Allocation
  - Risk Assessment
- ✓ Guidance on 401K 403b, 457, TSP. IRAs
- ✓ Roth Conversions
- ✓ Social Security Planning
- ✓ Income Distribution
- ✓ Insurance Review
- ✓ Legal Docs. Review
  POAs, Wills, HCP, Living Tr.
- ✓ Tax Return Review
- ✓ One-time Implementation
- ✓ 30 Day Support after report delivery
- X On-going Monitoring
- X Estate Planning

Popular with those Age 45+ who want to be attentive about their financial security for Retirement.

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