KIRTLAND
Financial Management

CLIENT SERVICE MATRIX

$500k-$1M

Investment Management

- Investment Policy Statement
- Basic Goal Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Annual Reviews
- IRA distribution planning
- Newsletters/Market Insight
- Advice on outside 401(k) accounts (For additional fee)

$1M-$2M

Comprehensive Financial Planning

- Investment Policy Statement
- Comprehensive Goal Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Semi-Annual or Annual Reviews
- IRA distribution planning
- Newsletters/Market Insight
- Advice on outside 401(k) accounts
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education and Gifting Strategies
- Long Term Care Planning

Over $2M

Comprehensive Wealth Management

- Investment Policy Statement
- Comprehensive Goal Planning & Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Quarterly, Semi, or Annual Reviews
- IRA distribution planning
- Newsletters/Market Insight
- Advice on outside 401(k) accounts
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education and Gifting Strategies
- Long Term Care Planning
- Online Vault
- Charitable planning strategies
- Coordinate and attend meetings with family and other advisors
- After-hours access to KFM staff

100 ALMERIA AVENUE, SUITE 302 | CORAL GABLES, FLORIDA 33134 | WWW.KIRTLANDFINANCIAL.COM

The Financial Planning or Consulting services listed are generally those offered under the Wealth Advisory Services Agreement. However, fees and services are customized with each client agreement. For a complete list of fees and available services, please consult the most current Form ADV Part 2A and the Wealth Advisory Services Agreement that you may obtain from your Investment Adviser Representative.