Income Strategy Services, clients come first! at The Strategic Wealth Advisor® LLC

Our approach to delivering comprehensive financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver customized strategies along with your personal ***Financial Action Checklist***. Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment strategies, tax reduction strategies, future income and distribution strategies and family wealth strategies.

We then schedule to meet with you on a regular basis to discuss and update your financial situation. We pride ourselves in our constant calendars of client services and regular client communications to keep you informed of economic news and appropriate tax law and estate rule updates.
As we said earlier, at The Strategic Wealth Advisor®, clients come first!

Some of the ways we differ from other firms include:

- Our strong menu of ***Financial Strategies*** which include a comprehensive review of: your tax reduction strategies; estate strategies, investment strategies, future income strategies; and, protection strategies
- Our frequent and regularly scheduled meetings with clients to update your specific strategies and discuss your personal situations.
- Our strong and consistent calendar of high quality newsletters, tax reports, and other reports and articles.
- Our frequent schedule of client educational and appreciation events.
- Our personal service that features our best and most current ideas, suggestions and solutions. Each person is has unique goals.

Compare our list of *Financial Services* to the services you receive today.

Your Firm	SWA	
		Investment "Watch Dog" Service
☐	☑	Reviewing your investments and designing a personalized portfolio appropriate to your needs
☐	☑	Continual monitoring of your investments
☐	☑	Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your portfolio
☐	☑	Quarterly Statements
☐	☑	Independent Advice
☐	☑	Recommendations regarding allocations within your employer provided plans such as 401(k)s
☐	☑	Aggregation of all your accounts to simplify and reduce paperwork
		Tax Reduction Strategies
☐	☑	Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies
☐	☑	Quarterly review of your tax situation and planning to incorporate any new tax law changes
☐	☑	Complimentary consultation with your tax preparer
☐	☑	Recommendations of tax solutions including tax advantaged investments
☐	☑	Staying up-to-date on and presenting new tax laws that can affect your situation
		Income & Distribution Strategies
☐	☑	Analysis of your income needs now and in the future
☐	☑	Analysis of potential estate tax liabilities
☐	☑	Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
☐	☑	Recommendations regarding the most appropriate distribution strategy for your employer plans & IRAs
☐	☑	Analysis of the beneficiaries of your IRAs
☐	☑	Review the possibilities of converting to a Roth IRA
		Family Wealth Strategies
☐	☑	Analysis of your current estate plan and concerns
☐	☑	Complimentary consultation with your attorney
☐	☑	Assistance in transferring assets to your Living Trust or other trusts
☐	☑	Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
☐	☑	Review of beneficiary designations and asset titling
☐	☑	Review of your long-term care needs.
		Client Services & Communications
☐	☑	Quarterly Newsletter to keep you apprised of the most current strategy options
☐	☑	Quarterly, semi-annual or annual reviews
☐	☑	Special reports on how to help reduce your taxes and other important topics
☐	☑	Special Gold Medal Service Events (including client education and appreciation events)