JRC WEALTH
MANAGEMENT

Menu of Services

	Under $500K	$500K-$1M	$1M+
Advisory Fee	1.50%	1.25%	1%
Service Standard			
Ongoing Meeting Frequency	Annual	Annual	Semi-Annual
Pre-scheduled phone check-ins	0	3	4
Return Calls/Emails	1-2 business days	1 business day	Same Day
Client Appreciation Events		X	X
Investment Management			
Custom Portfolio Construction		X	X
LPL Centrally Managed Portfolio	X		
Proactive responses to changing market conditions		X	X
Detailed Progress Tracking & Reporting	X	X	X
Financial Planning			
Detailed Retirement Planning	X	X	X
Tax Planning		X	X
Retirement Income Planning		X	X
Employee Benefit Review		X	X
Insurance Review		X	X
Basic Estate Planning	X	X	X

*$100k minimum investment