



## CLIENT SERVICE MATRIX

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### Financial Planning

- Investment Management
- Investment Policy Statement
- Goal Planning and Monitoring
- RJ Investor Access
- Digital Document Vault
- External Accounts
- Semi Annual Client Review
- Capital Gains Tax Planning
- 401k Review
- College Planning

### Custom Financial Planning

- Social Security / Medicare Review
- Long-Term Care Planning
- Survivor Needs
- Tax Documents to CPA
- Investment Management
- Investment Policy Statement
- Goal Planning and Monitoring
- RJ Investor Access
- Digital Document Vault
- External Accounts
- Quarterly Client Review
- Capital Gains Tax Planning
- 401k Review
- College Planning

### Concierge Wealth Management

- Charitable Planning Strategies
- Customized Estate Plan
- Insurance Risk Management
- Total Asset Allocation
- Social Security / Medicare Review
- Long-Term Care Planning
- Survivor Needs
- Tax Documents to CPA
- Investment Management
- Investment Policy Statement
- Goal Planning and Monitoring
- RJ Investor Access
- Digital Document Vault
- External Accounts
- Quarterly Client Review
- Capital Gains Tax Planning
- 401k Review
- College Planning

4300 B Street, Suite 507

Anchorage, Alaska 99503

[www.wealthstrategiesalaska.com](http://www.wealthstrategiesalaska.com)

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