PROFESSIONAL PLANNING COORDINATION SERVICES

SEVEN (7) LEVELS OF PROFESSIONAL PLANNING COORDINATION SERVICES FOR INDIVIDUAL, FAMILY, BUSINESS, NON-PROFIT, TRUST & ESTATE ADMINISTRATION CLIENTS

PPC SERVICE DESCRIPTIONS		THREE INFORMAL PPC SERVICES PROVIDED						ADVISOR PARTICIPATION[2]		TIME COMMITMENT PER MEETING	MEETINGS PER YEAR
Service Level	Service Type	Client Portal	Planning Meeting	Document Vault Management	Investment Asset Tracking	Portfolio Performance Reporting [3]	Financial Plan Uploaded [1]	Meeting Preparation Required [2]	Meeting Attendance Required	Meeting Length	# Meetings
Level 1	Client PPC Service "Lite"	No	Yes	No	No	No	No	No	No	2 Hours	1
Level 2	Client Portal PPC Service with Secure Single Sign-On (SSO), Asset Tracking, Performance Reporting, Document Vault and Financial Plan access	Yes	None	Yes	Yes	Yes	If Available	No	No	N/A	0
Level 3	Client PPC Service "Lite" & Client Portal PPC Service- Combined	Yes	Yes	Yes	Yes	Yes	If Available	No	No	2 Hours	1
PPC SERVICES (includes all Level 2 Services)		FOUR FORMAL PPC SERVICES PROVIDED						ADVISOR PARTICIPATION[2]		TIME COMMITMENT PER MEETING	MEETINGS PER YEAR
Level 4	Basic PPC Service	Yes	Annual	Yes	Yes[3]	Yes[3]	Yes[1]	Yes	No	3 Hours	1
Level 5	Lifetime PPC Service	Yes	Semi-Annual	Yes	Yes[3]	Yes[3]	Yes[1]	Yes	No	3 Hours	2
Level 6	Enhanced PPC Service	Yes	Tri-Annual	Yes	Yes[3]	Yes[3]	Yes[1]	Yes	Optional	3 Hours	3
Level 7	Comprehensive PPC Service	Yes	Quarterly	Yes	Yes[3]	Yes[3]	Yes[1]	Yes	Yes	3 Hours	4

(1) All Individual and Family Formal PPC Services require a Financial Plan prepared and delivered by a Certified Financial Planner - CFP®
(2) Some Advisors may charge for meeting preparations and attendance.
(3) Required only for Individual, Family and Trust Clients (Optional for Business, Non-Profit and Estate Administration Clients).

LET US HELP YOU ORGANIZE YOUR FINANCIAL AFFAIRS, COORDINATE YOUR WEALTH PLANNING EFFORTS AND REACH YOUR FINANCIAL PLANNING GOALS.

CLIENT'S PARTICIPATING ADVISORS

- Attorney
- CPA
- CFP® (Certified Financial Planner)
- Life insurance Agent
- Property & Casualty Agent
- Investment Advisor
- Trust Officer