



# CLIENT SERVICE MATRIX

\$100,000  
-  
\$1,000,000

## Basic Client

### Asset Management

- Basic Outcome-Based investment Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Quarterly Check-in phone calls
- Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts (For additional fee)
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault

\$1,000,000  
-  
\$2,500,000

## Preferred Client

### Wealth Management

- Investment Policy Statement Review
- Comprehensive Goal-Based Planning and Monitoring
- Quarterly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Monthly scheduled Check-in phone calls
- Semi, or Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts
- All-inclusive account aggregation of external holdings
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education and Gifting Strategies
- Long Term Care Planning
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault
- Other Services Upon Request

Over  
\$2,500,000

## Private Client

### Comprehensive Wealth Management

- Investment Policy Statement Review
- Comprehensive Goal - Based Planning & Monitoring
- Monthly Performance summary reports
- Capital Gains Tax Planning
- Beneficiary Review for RJ Retirement Plans
- Monthly scheduled Check-in phone calls
- Semi, or Annual Reviews In-Person
- IRA distribution planning
- Newsletters and Market Insight
- Advice on outside 401(k) accounts
- All-inclusive account aggregation of external holdings
- Work with CPA to provide year-end tax documents
- Assistance in reviewing Insurance strategies
- Education & Gifting Strategies
- Long Term Care Planning
- Charitable planning strategies
- Coordinate and attend meetings with family and other advisors
- Online and Mobile App Access to Account
- Digital Document Organizer/Online Vault
- Other Services Upon Request

Great Lakes Wealth, LLC is a Registered Investment Advisor. The information provided is solely for informational purposes. Advisory services are only offered to clients or prospective clients where Great Lakes Wealth and its representatives are properly licensed or exempt from licensure. No advice may be rendered without a service agreement in place.