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## Gold Service

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The Gold Service model is designed for clients who are interested in singular or minimal planning strategy that address a specific area of concern.

- Financial Planning limited to two (2) of the following areas: Retirement, Education, Budgeting, Asset Allocation and Risk Management
- Access to Sterling Wealth Portal including unlimited vault access
- In-office annual review meeting
- Quarterly Investment Reports
- Quarterly Newsletter
- 24 hour returned phone calls
- Discounted hourly rates for appointments outside of scheduled meetings.

**\$1,500 First year**  
**\$750 Subsequent years**

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## Platinum Service

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The Platinum Service model is designed for clients who desire comprehensive financial planning and a more ongoing personal relationship.

Includes Gold Service plus...

- Comprehensive financial planning
- Coordination with estate attorney
- Coordination with CPA
- In-office annual and semi-annual review meetings
- 2 quarterly Skype meetings
- Monitoring and detailed monthly reports on company sponsored retirement plans
- Special event lunches
- Complimentary dependent children accounts \* *Restrictions Apply*
- Pension review and analysis

**\$3,000 First year**  
**\$1,500 Subsequent years**

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## Sterling Service

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The Sterling Service model offers clients our highest level of contact and white glove service with increased sophistication and attention in the planning and asset management phases.

Includes Platinum Service plus...

- Specialized planning including Medicare, Social Security, charitable giving, special needs and legacy
- Retirement life planning
- Coordination and meetings with estate attorney
- Coordination and meetings with CPA
- 4 in-person meetings per year at your desired location
- 1 family meeting per year
- Unlimited Skype/teleconferences
- Same day return phone call
- Detailed income distribution planning
- Client social events
- Tax planning
- Customized portfolio
- Complimentary adult children advisory services. \* *Restrictions Apply*

**\$5,000 - \$15,000 First year**  
**\$2,500 - \$7,500 Subsequent years**