Sterling Total Wealth Solutions Menu of Advisory Services

Gold Service

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

- Foundational financial planning
- Access to Sterling Total Wealth Solutions Portal including unlimited vault access
- In-office annual review meeting
- 2 additional virtual meetings
- Quarterly Newsletter
- 24 hour returned phone calls
- Discounted hourly rates for appointments outside of scheduled meetings.
- Monitoring and detailed monthly reports on company sponsored retirement plans

$1,500 First year
$750 Subsequent years

Platinum Service

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 including retirement, education, cash flow analysis, outside asset allocation, risk management
- Coordination with estate attorney
- Coordination with CPA
- 1 additional in-office annual meeting
- 2 quarterly virtual meetings
- Pension review and analysis
- Special event lunches
- Retirement life planning

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

Sterling Service

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

Includes Platinum Service plus…

- Specialized planning including Medicare, Social Security, charitable giving, special needs and legacy
- Coordination and meetings with your additional professional advisors
- Up to 4 in-person meetings per year at your desired location
- 1 family meeting per year
- Unlimited virtual/teleconferences
- Same day return phone call
- Detailed income distribution planning
- Additional social events
- Tax planning
- Complimentary adult children advisory services. * *Restrictions Apply*

$5,000 plus First year
$2,500 plus Subsequent years