# Wealth Management

KANE COMPANY

| | Investment Advisory Services | Wealth Management Services |
|---|---|---|
| Professionally Managed Investments using no-load, low-cost Institutional Funds and Separately Managed Accounts | ✓ | ✓ |
| Personalized Risk Analysis and Investment Policy Statement | ✓ | ✓ |
| Customized Portfolios with Opportunistic Rebalancing | ✓ | ✓ |
| Tax Efficient Investing and Tax Loss Harvesting | ✓ | ✓ |
| Investment Portal Access - Rate of Return Tracking | ✓ | ✓ |
| Triannual Investment Review Meetings | ✓ | ✓ |
| Wealthcare Planning - Cognitive Testing at age 65 | ✓ | ✓ |
| Kane Company Wealth Management Newsletters | ✓ | ✓ |
| Unlimited Calls and Emails regarding your Investments | ✓ | ✓ |
| Individual Income Tax Preparation | * | ✓ |
| Multi-Year Proactive Income Tax Planning and Strategy | * | ✓ |
| Power of Attorney for Income Tax Matters and Nuisance Letters | * | ✓ |
| CPA Representation during Income Tax Audits | * | ✓ |
| Quarterly Comprehensive Financial Planning and Retirement Review Meetings | | ✓ |
| Comprehensive Financial and Retirement Roadmap | | ✓ |
| Roth IRA Conversion Analysis | | ✓ |
| Required Minimum Distribution (RMD) and Qualified Charitable Distribution (QCD) Planning | | ✓ |
| IRA, Roth IRA, 401(k) and Other Pension Plan Consultation and Planning | | ✓ |
| Net Worth Analysis and Update | | ✓ |
| Retirement and Middlescence Planning | | ✓ |
| Post-Retirement Analysis and Projections | | ✓ |
| Social Security Benefit Maximization Planning | | ✓ |
| Estate Planning Analysis and Charitable Planning | | ✓ |
| College Funding Analysis and Family Education Planning | | ✓ |
| Asset Protection/Risk Management (Insurance) Analysis | | ✓ |
| Lifestyle Management - Whealthcare Planning - Proactive Aging Plan | | ✓ |
| Company Stock Options and Restricted Stock Analysis and Planning | | ✓ |
| Annual Employee Benefits Review | | ✓ |
| Access to Financial Planning Retirement Modeling Software | | ✓ |
| Unlimited Calls and Emails regarding your Comprehensive Financial Plan and any Financial or Tax Matter | | ✓ |

✓ Included * Available for Additional Fee