SelectWealth™

HOW WE CAN SERVE YOU

PLAN

to define your family vision and advance your family mission.

- Establish and review your personal goals and objectives
- Review your personal financial journey and your perspectives about money
- Cashflow review, analysis, and planning
- Education funding tools and strategies
- Retirement planning, including Social Security optimization, and savings & withdrawal strategies
- Tax planning and tax return review
- Employee benefits review and integration
- Executive compensation review and analysis
- Closely held business planning
- Coordination with your other professional advisors

PLUS

- Develop and confirm family mission, vision, and core values
- Facilitate bill payment
- Report on consolidated (outside) holdings

INVEST

to steward your wealth and resources for generations to come.

- Align your portfolio with your personal goals and objectives
- Determine asset allocation
- Portfolio selection and periodic strategy review
- Ongoing portfolio monitoring and rebalancing
- Tax mitigation strategies
- Ongoing investment education
- Investment Committee due diligence and ongoing performance & expense monitoring

PLUS

- Develop family investment policy statement
- Facilitate separately managed accounts
- Consult on and provide due diligence for external investment opportunities
- Develop and deliver financial education

PROTECT

to safeguard your loved ones, your property, and your lifestyle.

- Life insurance analysis
- Health insurance and Health Savings Account review
- Disability insurance analysis
- Long-Term Care analysis
- Property and Casualty insurance review
- Medicare review

PLUS

- Implement identity theft protection
- Monitor your public profile
- Facilitate family privacy audit

IMPACT

to carry forward your story, your purpose, and your legacy.

- Estate plan review
- Wealth transfer strategies
- Charitable giving tools and strategies
- Family education

PLUS

- Facilitate family meetings
- Advise on family governance
- Develop family archive framework

ADDITIONAL OFFERINGS

CoreWealth®
SignatureWealth®
Company Retirement Plans
Endowments & Foundations

FOSTER® GROUP

Your Financial Life, Truly Cared For®