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
- Special needs and Elder care planning
- 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 and Medicaid planning

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
- Caregiving succession planning

PLUS

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

ADDITIONAL OFFERINGS

CoreWealth SignatureWealth

Company Retirement Plans Endowments & Foundations



Please Note: Foster Group does not serve as an attorney, accountant, or insurance agent. Foster Group does not prepare estate planning documents or tax returns, nor does it sell insurance products. Foster Group is not engaged in the practice of law or accounting. All investment strategies have the potential for profit or loss. Asset allocation and diversification do not ensure or guarantee better performance and cannot eliminate the risk of investment losses. PLEASE SEE IMPORTANT DISCLOSURE INFORMATION at www.fostergrp.com/disclosures. A copy of our written disclosure Brochure as set forth on Part 2A of Form ADV is available at www.fostergrp.com.