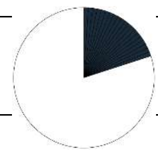
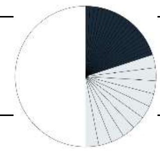
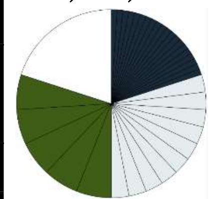
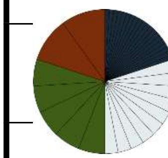
	PRESERVE WEALTH MANAGEMENT	Full-Service **Investment Planning**	Full-Service **Financial Planning**	**Full-Service Wealth Management**	Full-Service **Family Office**
Assets & Costs	Typical Rage of Investable Assets	$500,000 - $2MM	$1MM - $4MM	**$3MM - $30MM**	$30MM+
	Annual Planning Charge and Advisory Rate	0.75% / year ($5,000 min.)	$10,000 + 0.50% / year	**$25,000 + 0.50% / year**	$175,000 + 0.35% / year
	1% breakeven level	$500,000	$2,000,000	**$5,000,000**	$27,000,000
					
Services	☐ **Full Banking Services** *Investor High Yield Checking* · *Direct deposit* *Free standard checks* · *Electronic funds transfer* *Free ATM access* · *Federal funds wire* *Free on-line bill pay* · *Free Visa debit card* *Mobile deposits* · *$250,000 in FDIC insurance*	✓	✓	✓	✓
	☐ **Personal Client Service Team** *Dedicated service team* · *Administration* *Direct line dialing* · *Account services*	✓	✓	✓	✓
	☐ **Investment Management** *Personal investment policy* · *Cash flow coordination* *Asset allocation* · *Annual beneficiary reviews* *Rebalancing* · *Quarterly reporting* *Cost-effective implementation* · *Semi-annual review*	✓	✓	✓	✓
	☐ **Financial Plan and Goal Analysis** *Retirement planning* · *Stock option scenarios* *Education planning* · *Concentrated positions* *Social security planning* · *Pension integration* *Needs, wants, wishes* · *Bear market stress test* *Outside account integration* · *Special asset analysis* *Net worth statement* · *Saving & spending strategy* *Healthcare cost models* · *Quarterly strategy sessions*		✓	✓	✓
	☐ **Advanced Planning** Coordinated session with your other advisors *Targeted sessions with your accountant* *Targeted sessions with your estate lawyer* *Targeted sessions with your insurance team* *Targeted sessions with your charitable planning experts* *Senior aging and continuation plans* *Monthly action plan with deliverables*			✓	✓
	☐ **Personal CFO** *Financial accounting* · *Philanthropic management* *Bookkeeping and bill pay* · *Valuation services* *Trustee services* · *Enterprise reporting*				✓
	☐ **Family Professional** *Executive assistant* · *Family governance* *Concierge services* · *Family meetings / education*				✓

Complexity Simplified

info@preservewm.com | P.O. Box 99, Weaverville, NC 28787 | (855) PWM-2020