



REGISTERED | INVESTMENT | ADVISOR

THE POWER OF
A FIRM COMMITMENT™

Focused Wealth Management
BRONZE CLIENT FINANCIAL SERVICES

DEVELOPMENT. We can help you lay the foundation today for growth tomorrow.

We provide members of our Bronze Class with:

- Annual portfolio review
- Frequent phone and email communication
- Online access
- Monthly and quarterly newsletters
- Comprehensive financial product offerings
- Daily market commentary (on request)
- Next Phase Income Distribution planning*
- Financial planning available at additional cost*

*These services are available with a financial services agreement.

BRONZE CLIENT BENEFITS