



REGISTERED | INVESTMENT | ADVISOR

THE POWER OF  
A FIRM COMMITMENT™

Focused Wealth Management  
**GOLD CLIENT FINANCIAL SERVICES**

**HANDS-ON-EXPERIENCE.** More distinctive benefits and a higher level of service for money management.

We provide members of our Gold Class with:

- In-depth account analysis
- Comprehensive annual review meetings
- Comprehensive semi-annual portfolio review
- Frequent phone and email communication
- Collaboration with CPA
- Collaboration with attorney
- Online access
- Access to Focused Wealth Management's strategic partners
- Monthly and quarterly newsletters
- Comprehensive financial product offerings
- Daily market commentary (upon request)
- Next Phase Income Distribution planning\*
- Financial planning\*
- Tiered management fee schedule\*

\*These services are available with a financial services agreement.

**GOLD CLIENT BENEFITS**