Focused Wealth Management

REGISTERED | INVESTMENT | ADVISOR

THE POWER OF
A FIRM COMMITMENT™

Focused Wealth Management

PLATINUM CLIENT FINANCIAL SERVICES

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

We provide members of our Platinum Class with:

- In-depth account analysis
- Comprehensive annual review meetings
- Progress meetings (upon request)
- Comprehensive quarterly portfolio review
- Frequent phone and email communication
- Next Phase Income Distribution planning
- Financial planning
- Collaboration with CPA
- Collaboration with attorney
- Family/inter-generational meetings
- Online access
- Tiered management fee schedule
- Access to Focused Wealth Management's strategic partners
- Business planning
- Charitable gift planning
- Monthly and quarterly newsletters
- Client service with team of advisors
- Research reports
- Comprehensive financial product offerings
- Direct Platinum Client hotline
- Daily market commentary (upon request)

PLATINUM CLIENT BENEFITS

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