BOWBRIDGE
ADVISORY GROUP

Menu of Services

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Virtual Family Office Services

Client Service and Communication

- Welcome Letter & New Client *Financial Roadmap*.
- 14, 30, 45, 60 day onboarding check in meetings.
- Same day response for client inquiries and requests.
- Ongoing invitations to client appreciation and education events, both live and virtual.
- Premier access to top tier professionals and analysts

Tax Review

- Tax Planning and Review
- Coordinate with CPA &/or EPA
- Tax prep credit
- Legislative/tax law change notification

Insurance Review

- Life Insurance Review
- Property and Casualty Review
- Health Insurance Review
- Long Term Care Review

Estate Planning

- Analysis of your current estate plan, addressing any immediate concerns.
- Establish and amend (bi-annually) your estate plan including Will, Trust, Power of Attorney and Health Care Directives.
- Annual family meeting with us, your family members and beneficiaries.
- Guidance with the appropriate and necessary steps in the event of the death of a loved one.
- Assistance in transferring assets to your living trust.

Financial Planning Services

- Written comprehensive financial plan, to include:
    - Net worth calculation/evaluation.
    - Cash flow projections.
    - Lef scenario projections.
    - Current income and cash flow management.
    - Debt management and consolidation.
- Retirement plan management.
- Education planning (529).
- Estate plan and trust review.
- Mortgage review and/or purchase analysis.
- Charitable gifting strategies.
- Family wealth/legacy planning.

Specialty Services

- LPOA
- Social Security optimization analysis/timing guidance
- Small Business Owner Planning
    - Employee Benefits for Staff
- Purchase/IPO Options
- Employee Benefits Review
    - Stock Options & holdings
- Executive compensation planning

- Personal property review/support/logistics (auto boat, home, etc.)

- College Counseling
- Automobile concierge shopping service

Comprehensive Wealth Management Services

Client Service and Communication

- Welcome Letter & New Client Roadmap.
- 3 Month onboarding check in meeting.
- Online account access with set up support & technical assistance.
- e-Delivery set-up Assistance.
- Annual in person review meeting.
- Ongoing invitations to client appreciation and education events, both live and virtual.

Investment Services

- Design and maintenance of personalized investment solutions and a portfolio appropriate for your needs.
- Recommendations regarding allocation and positioning of funds in retirement plans.
- Ongoing due diligence and monitoring of investments.
- Access to a professional investment team to comprehensively support your needs and questions.

Financial Planning Services

- Written comprehensive financial plan, to include:
  - Net worth calculation/evaluation.
  - Multi-scenario comparisons
  - Cash Flow projections
  - Tax considerations