COMPREHENSIVE SERVICE PLATFORM

SABLE POINT
WEALTH MANAGEMENT

FINANCIAL PLANNING

+ Organize finances and cash flow management
+ Identify and plan for life goals
+ Saving needs to fund lifestyle
+ Implement customized strategic plan
+ Ongoing risk management
+ Charitable giving
+ Multi-generational wealth transfer
+ Captive insurance companies
+ Consult on mortgage refinancing
+ Evaluate vacation properties
+ Consult with commercial and personal financing lenders
+ Planning for employee stock options
+ Review of employee benefits
+ Banking lending including line of credit and collateralized loans

INVESTMENTS

+ Quantify investment objective
+ Asset allocation strategies and rebalancing
+ Consolidated performance reporting
+ Investment manager evaluation and research
+ Retirement and non-retirement account allocation

TAX

+ Tax optimization and management by advising on taxes incurred when clients buy and sell assets
+ Advise on account type (IRA, ROTH, 529)
+ Advise on the timing of social security benefits

EDUCATION

+ Educational events featuring RFG Advisory's Chief Investment Officer Rick Wedell
+ Weekly, monthly or quarterly economic updates
+ Personal consultation available for each client's unique situation

RFG CLIENT PORTAL

+ Real time access to net worth, goals, financial plan via customized and interactive mobile-friendly client portal Fetch Financial Life Hub that aggregates all clients' information including assets not managed by advisor
+ Vault for organization of important documents

TRUST & ESTATE

+ Trust company or trustee selection
+ Coordinate communication with attorneys and CPAs
+ Estate planning
+ Lifetime gifting strategies

BUSINESS CONSULTING

+ Succession planning
+ Advise on family business dynamics and sale of family business
+ Advise on mergers and acquisition opportunities

INSURANCE

+ Evaluate which types and how much insurance is appropriate
+ Discuss and manage longevity risk and long-term care

YOUR TOP PRIORITIES

+ ____________________
+ ____________________
+ ____________________
+ ____________________

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NOTES

RFG ADVISORY

YOUR FUTURE
IS OUR PRIORITY

PERSONALIZED APPROACH | PASSION FOR CLIENTS | TRUSTED GUIDANCE