



# *Gold Medal Services*

*“The New Standard in Personalized Wealth Management”*

## **Investment “Watch Dog” Service**

- Reviewing your investments and designing a personalized portfolio appropriate to your needs
- Year-long, continual monitoring of your investments
- Quarterly, semi-annual or annual meetings to: review and evaluate your investment performance, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- Quarterly Statements
- Independent Advice
- Commission-free transactions on most stocks, bonds or mutual funds traded in your account (certain transaction fees may apply)
- Recommendations regarding positioning of funds within your employer provided retirement plans such as 401(k)s
- Quarterly “market watch” letter detailing our firm’s research, analysis and view of the current state of the investment markets

## **Tax Reduction Planning**

- Comprehensive review of your tax return to highlight opportunities for maximizing tax reduction strategies
- Quarterly review of your tax situation and planning to incorporate any new tax law changes
- Free consultation with your tax preparer
- Recommendations of tax solutions including tax advantaged investments
- Staying up-to-date on and presenting new tax laws that can effect your situation

## **Retirement Income & Distribution Planning**

- Analysis of your income needs now and in the future
- Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
- Recommendations regarding the best distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA

## **Family Wealth Planning**

- Analysis of your current estate plan and concerns
- Free consultation with your attorney
- Assistance in transferring assets to your Living Trust or other trusts
- Providing guidance with the appropriate and necessary steps in the event of the death of a loved one

## **Client Services & Communications**

- Quarterly Newsletter to keep you apprised of the most current planning options
- Quarterly, semi-annual or annual reviews
- Special reports on how to help reduce your taxes and other important topics
- Special Gold Medal Service Events, including client appreciation events (where you may bring up to 2 guests)

**Oak Point Financial, LLP 16545 Southwest Freeway, Ste. 175 Sugar Land, TX 77479 (281) 491-2800**