Money Matters

WEALTH ♥ SOLUTIONS

Donna Cates CDFA®, CRPC®
donna@wwbpartners.com

Silver
$250,000 in Investable Assets

·Goals and objectives review
·Custom analysis of risk tolerance
·Investment management agreement
·Overall net worth analysis
·Asset allocation review
·Portfolio rebalancing
·Portfolio performance reporting
·Tax and cost-basis reporting
·Consolidated online account access
·Notary Services

Additional Services*
·Financial plan development
·Financial plan updates
·Divorce Financial Planning

Gold
$500,000 in Investable Assets

·Comprehensive financial plan
·Retirement needs analysis
·Income distribution strategies
·Education planning and funding
·Comprehensive insurance planning

·Goals and objectives review
·Custom analysis of risk tolerance
·Investment management agreement
·Overall net worth analysis
·Asset allocation review
·Portfolio rebalancing
·Portfolio performance reporting
·Tax and cost-basis reporting
·Consolidated online account access
·Notary Services

Additional Services*
·Financial plan updates
·Financial plan updates
·Divorce Financial Planning

Platinum
$1,000,000 in Investable Assets

·Strategic planning for wealth conservation
·Tax-optimized investing and giving
·Annual financial plan updates

·Comprehensive financial plan
·Retirement needs analysis
·Income distribution strategies
·Education planning and funding
·Comprehensive insurance planning
·Consolidated online account access
·Notary Services

·Goals and objectives review
·Custom analysis of risk tolerance
·Investment management agreement
·Overall net worth analysis
·Asset allocation review
·Portfolio rebalancing
·Portfolio performance reporting
·Tax and cost-basis reporting
·Consolidated online account access
·Notary Services

Additional Services*
·Financial plan updates
·Divorce Financial Planning

* Additional services available for an hourly consulting or fixed fee

WOMEN'S Wealth BOUTIQUE

We work with single corporate women, women facing divorce, and young accumulators who seek education and support in various aspects of their financial lives.

We take the time to learn your story. We believe that fiduciary status is not just some government regulation; it is a promise that we make to every client to provide them with the highest level of care possible.

Our firm will always strive to get your assets working for you. We provide the platform to be who you are meant to be, to spend where it feels good, and to invest where your hearts are.

Assets Under Management	Advisor Fee
Under $1,000,000	1.50%
$1,000,001 - $2,000,000	1.25%
$2,000,001 +	1.00%

Package Type	Client's Estimated Net Worth	Estimated Fee for Financial Plan
Silver Package	$250,000	$3,500
Gold Package	$500,000	$5,800
Platinum Package	$1,000,000	$8,900
Platinum Package	$1,000,001+	as quoted