COROMANDEL WEALTH MANAGEMENT

Gold Medal Services

Our Premium Offering for Personalized Wealth Management

Investment "Watch Dog" Service

CWM	Your FA	
☑	☐	Meet twice a year to evaluate your investment performance, update your overall financial objectives and, if necessary, adjust your portfolio to meet your life needs
☑	☐	Rebalance your investment allocation mix quarterly as required
☑	☐	Quarterly investment statements
☑	☐	Recommend how to best position the funds within your employer-provided retirement plan
☑	☐	Provide independent, objective advice

Tax Planning

CWM	Your FA	
☑	☐	Annual review of your tax return to highlight opportunities for maximizing tax reduction
☑	☐	Notify you of new laws that can affect your tax situation, and suggest appropriate responses
☑	☐	Recommend tax reduction strategies, including specific tax-advantaged investments

Retirement Income and Distribution Planning

CWM	Your FA	
☑	☐	Analyze your current and future income needs and distribution requirements
☑	☐	Suggest how to best fund your income needs in order to meet your desired standard of living
☑	☐	Advise you of the best distribution strategy for employer retirement plans and IRAs
☑	☐	Review the beneficiaries of your IRAs and ensure that they are set up properly
☑	☐	Provide guidance on how to correctly set up an Inherited IRA

Family Wealth Planning

CWM	Your FA	
☑	☐	Analyze your current estate plan and estate funding strategies
☑	☐	Provide a free annual consultation with your attorney
☑	☐	Assist in transferring assets to your Living Trust or other trusts
☑	☐	Provide guidance on appropriate steps in the event of the death of a spouse or parent

Client Services and Communications

CWM	Your FA	
☑	☐	Quarterly "Market Watch" newsletter describing our view of the current state of the investment markets
☑	☐	Monthly e-newsletter covering economic developments, tax law changes and tips, financial market activities, and personal finance items of interest
☑	☐	Semi-annual review of your investment allocations
☑	☐	Reports on how to reduce your taxes, estate planning issues, and other relevant topics
☑	☐	Seminars on tax planning, estate planning, and other timely financial planning topics

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