Financial Life Planning Client Services

CLARITY & TARGETS

At Suncoast Advisory Group, nothing inspires us more than helping clients turn someday dreams into reality today. In order to understand those someday dreams, we need to understand you and your values and your ideal vision so we can help improve your sense of fulfillment and enhance your quality of life. During our personal discovery process, we:

- Discover your personal, business and retirement goals through our five-stage financial life planning process.
- Discuss and review all relevant financial documents.
- Analyze your current income, cash flow, and net worth.
- Assess your personal Communication and Behavioral DNA profiles.

CHECKPOINTS

We find enormous satisfaction in helping you align your values, goals, and aspirations with sound strategies that allow you and your business to thrive. As we investigate all aspects of your holistic financial picture, our specific objectives are to:

- Design a personalized life plan that allows you to pivot from day to day, bringing "why" into the planning process and providing support and flexibility on your financial journey.
- Position your personal and business finances for minimal tax burdens.
- Offer ongoing investment management and analysis along with risk assessment to progress toward your personal goals.
- Review your insurance needs systematically and comprehensively.

STRATEGIES

Working together means moving you steadily from vision to reality. Your financial life plan, coupled with our web of support, helps you focus on necessary daily practices to better reach your long-term goals. By consistently checking in with your plan, we ensure you are on your way to turning someday dreams to today's dreams as we:

- Provide online access to a personalized family financial website that includes easy access to your key financial documents and aggregation of all your personal and business accounts
- Deliver business consulting and planning services to make sure the way you work is in line with the way you plan
- Provide Social Security analysis for ongoing retirement income so you remain in control of your future
- Help you plan for long term needs such as future healthcare, personal and business insurance and children's education
- Coordinate your life and business plan with your CPA and attorney to align all aspects of your total financial picture
- Provide support and flexibility on your financial journey

COST OVERVIEW

For those clients with investable assets and net worth valued at $500,000 and above, we charge a flat annual retainer ranging between $1,875 and $5,000 per quarter. This retainer includes comprehensive financial life planning, consulting services, and on-going management and advisement of your investment portfolio.

For those clients with investable assets and net worth valued less than $500,000, we charge 1.5% - 2% annually based on assets under advisement and ongoing management, plus the one time cost of $3,500 to $5,000 that covers your comprehensive financial life plan and supportive consulting services.

Account Level	Annualized Fee
$50,000 to $249,999	2%
$250,000 to $499,999	1.5%

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