

# 80 Things Weaver Wealth Advisory Group Does For YOU

- Cares almost as much as family
- Seek to understand needs
- Clarifies current situation
- Gets you to consider finances
- Organizes your finances
- Puts your goals in writing
- Helps you prioritize
- Helps you be realistic
- Studies alternatives
- Prepares a financial plan
- Makes recommendations
- Implements recommendations
- Suggests creative alternatives
- Reviews life insurance needs
- Sets up a company retirement plan
- Reviews custodial accounts
- Helps you make tough decisions
- Prepares asset allocation plan
- Helps you understand risk
- Does due diligence on money managers
- Stays current on industry changes
- Monitors your investments
- Reviews your retirement accounts
- Suggests portfolio changes
- Guides you through tough times
- Improves your investment performance
- Prevents duplicate holdings
- Converts investments to income
- Helps you evaluate risk
- Provides research
- Provides you with stock analysis
- Provides written portfolio evaluation
- Provides technical analysis
- Provides options strategies
- Provides alternative investment options
- Provides access to restricted stocks
- Introduces you to money managers
- Provides online statement access
- Shops for best rates
- Provides access to firm research
- Suggests strategies to lower taxes
- Reviews tax returns for potential savings
- Repositions investments as a tax advantage
- Works with your tax/legal advisors
- Monitors life changes
- Proactively keeps in touch
- Are only a call away
- Provides definition of financial terms
- Provides referrals to other professionals
- Refers you to a bank if appropriate
- Provides a monthly income chart
- Suggests income enhancements
- Shares experiences of similar clients
- Helps educate your family members
- Holds seminars on new concepts
- Helps with intergenerational planning
- Facilitates transfer of investments
- Keeps you on track
- Identifies your savings shortfalls
- Helps with a debt reduction strategy
- Provides retirement education
- Educates you on estate planning
- Educates you on education savings
- Is someone you can trust
- Is a good sounding board
- Is honest with you