



LEVEL FOUR

Advisory Services

A DIVISION OF
LEVEL FOUR GROUP, LLC

4 LEVELS OF PLANNING

1

Organize

- ◆ Financial Website
- ◆ Cash Flow Analysis
- ◆ Secure Digital Vault
- ◆ Monthly Maintenance

\$2,500 per year

2

Investments & Retirement

- ◆ Level One +
- ◆ Fiduciary Investment Advice
(Regardless of asset location)
- ◆ Alternative Investment Analysis
Real Estate, Collectibles, Cyber Currency, Etc.
- ◆ Guaranteed Income Analysis
Social Security, Pensions, Etc.
- ◆ Lifetime Cashflow Projection
- ◆ Advanced Goal Modeling
- ◆ Roth Conversion Analysis

\$4,500 per year

3

Insurance & Estate Planning

- ◆ Level Two +
- ◆ Insurance
 - ◆ Health, Medicare/ Medigap/RX Plan
 - ◆ Life, LTC, Disability
 - ◆ Auto, Home, Umbrella
 - ◆ Identity Theft Protection
- ◆ Estate Plan Analysis
 - ◆ Review Existing Documents
 - ◆ Design New Plans
 - ◆ Estate Equalization
 - ◆ Facilitate Family Meetings

\$6,000 per year

4

The Kitchen Sink

- ◆ Level Three +
- ◆ Anything from the Personal Planning Menu

\$10k-25k per year

**depending on complexity*

Let's get started. What keeps you up at night?



Terry Thompkins, CFP®, CLU®, AEP®, ADPA®
Practice Director - Financial Planning & Wealth Advisor

- 📞 972.284.5492
- 📞 866.834.1040
- 📞 469.328.4626
- 📞 866.763.9136
- ✉ tthompkins@levelfourfinancial.com



We do not offer tax or legal advice.

Securities offered through Level Four Financial, LLC Member FINRA/SIPC. Advisory services offered through Level Four Advisory Services, LLC, an SEC-registered investment adviser. Insurance services offered through Level Four Insurance Agency, LLC. Level Four Financial, LLC, Level Four Advisory Services, LLC, and Level Four Insurance Agency, LLC are independent but related entities.

Level Four Group, LLC is a division of CRI Capital Group, LLC, a subsidiary of CRI Advisors, LLC. "CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. ("CPA Firm") and CRI Advisors, LLC ("Advisors") and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.