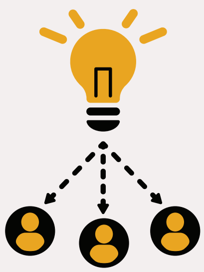
PRIVATE CLIENT SERVICES

LEVEL FOUR® Advisory Services
A DIVISION OF LEVEL FOUR GROUP, LLC

PRESERVING YOUR LEGACY FOR GENERATIONS TO COME

COMPREHENSIVE SERVICES



- Investments
- Tax Planning
- Estate Planning
- Household Management Services
- Education & Beneficiary Mentoring
- Philanthropy & Charitable Giving
- Organization & Document Management
- Fiduciary Services
- Insurance
- Personal Finance & Expense Management
- Governance & Facilitation
- Lifestyle

Inspired by the past.
Defined by the present.
Creating the future.

Our team is fully invested in your continued success.

Level Four provides a boutique multi-faceted experience with a multi-generational outlook. We are backed by the strength of a national enterprise and the experience and knowledge of our ensemble team.

We are committed to simplifying your wealth management experience.

Today's market complexity demands specialized attention and a modern approach to wealth management. Our approach ensures that clients receive truly comprehensive and proactive advice by connecting you to a team of specialists who offer holistic solutions to ensure a lasting legacy.

Level Four - Private Client Services goes beyond conventional asset management. Your management team of in-house specialists will advise you on all aspects of wealth; from risk management, strategic planning, investing, tax planning, estate planning, and more.

As a firm, we put your needs first and prioritize your goals in both a neutral and objective fashion which enables us to be your fiduciary. We believe in providing proactive services through a centralized four-step process of Organizing, Creating, Planning, and Communicating. We pride ourselves in being able to leverage your combined forms of capital — Financial, Intellectual, and Human — in order to protect what you've worked hard to achieve.

Private Client Services will direct an ensemble team of advisor specialists working in concert to implement customized strategies aligned with your vision.

THE LEVEL FOUR PRIVATE CLIENT DIFFERENCE

TRANSPARENCY

EXCLUSIVITY

SYNCHRONY

ACCESS

PRIVATE CLIENT SERVICES

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Your Private Client Wealth Advisor:

Your ensemble team of advisors work in concert to implement customized strategies aligned with your vision.

Your Private Client Wealth Advisor serves as a primary contact and will coordinate the activities of your tax, legal, and wealth management advisors.

The role of your Private Client Wealth Advisor is defined by the scope of the your needs and services selected (see below) to be provided by your ensemble team of advisors.

Investments

- Strategic asset allocation and investment strategy
- Ongoing investment due diligence, selection and monitoring
- Investment Policy Statement for any or all accounts
- Consolidated investment reporting

Tax Planning

- Federal, State and Local income tax planning
- Charitable tax planning and structuring
- Tax planning for trusts and estates
- Closely held business tax planning and coordination
- Coordinate documentation for tax compliance

Insurance

- Personal Liability assessment,
- Coordinating life, property & casualty, and umbrella insurance reviews
- Cybersecurity needs

Team Management

- Tax Partner
- Investment Advisor
- Private Client Services Coordinator
- Accounting Professional
- Practice Specialists

Estate Planning

- Creation and communication of wealth transfer objectives
- Annual estate plan review, recommendation, monitoring
- Estate plan illustrations; flowchart, entity abstracts, and analysis

Fiduciary Services

- Trust administration and management
- Fiduciary accounting and beneficiary communication
- Infrastructure and platform to assists the trustee with complex trust obligations
- Provide liability support and advice for all trustees

Organization & Document Management

- Maintain legal document inventory, including copies of entity organization/ trust documentation, tax ID documents, annual reports, minutes, etc.
- Maintain summary of major assets, ownership and key contacts
- Maintain copies of investment documents, statements, and tax, income & expense documents

Personal Finance & Expense Management

- Customized financial reporting; balance sheet, income statement, general ledgers
- Receive/post/track payables & payments
- Establish internal controls (expense approvals/archiving)
- Categorize and code transactions, track transfers between entities

Lifestyle

- Credit solution consulting & liability management
- Guidance with acquisition/financing of assets (homes, boats, planes, etc.)
- Private Banking

Governance

- Family mission statement development and implementation
- Family governance development; family constitution
- Family meeting facilitation

Education & Beneficiary Mentoring

- Development of individual and family education plans
- Delivery of education to next generation focused on all aspects of family wealth
- Trustee and beneficiary mentoring
- Facilitate joint tax, legal, and investment manager meetings

Philanthropy & Charitable Giving

- Philanthropic mission statement development
- Foundation governance and administration
- Educational support on philanthropic endeavors
- Facilitate next generation involvement
- Charitable structure evaluation
- Strategic tax planning & giving strategies

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