Service Menu

INDIVIDUAL SERVICES

Managed/Fee-Based Accounts

Institutional Shares

- IRA- Traditional and ROTH
- Brokerage Accounts
- Custodial Accounts
- Trust Accounts
- Estate Accounts

Risk Management Services

- Life insurance - Whole, Term and Universal Insurance
- Immediate and Deferred Annuities
- Disability Insurance
- Long-Term Care Insurance

Personal Finances Planning

- General Consulting Services
- Retirement Planning
- Wealth Management
- College planning

Retirement Planning Services

- Retirement Projections
- Social Security Planning
- Medicare Planning
- Long-Term Care Planning

Estate Planning Services

- Estate accounts
- Trust Accounts
- Legacy Goal Setting and Planning

Wealth Management Services

- Managed Portfolios
- Annuities
- Endowment Planning

Financial Consulting/Fee-Only – Hourly or set fee for advisory services and ongoing financial assistance.

Financial Planning* – A fee to create a comprehensive financial plan involves a variety of areas, including Life and Disability Insurance Planning, Tax Planning and Management, Asset and Debt Management, Estate Planning, and an overall evaluation of goals and objectives to provide context for the financial plan in its entirety.

BUSINESS PLANNING SERVICES

Business Managed/Fee-Based Accounts

Institutional Shares

- Employer Retirement Planning
- Small Business Retirement Plans
- Solo 401(k)
- Traditional 401(k) with a ROTH 401(k) option
- Simplified Employee Pension Plans (SEP-IRA)
- Savings Incentive Match Plan for Employees (SIMPLE) IRA
- SIMPLE 401(k)
- Safe Harbor 401(k)

Business Risk Management

- Corporate Owned Life Insurance
- Long Term Disability Insurance Buyout
- Life insurance buyout
- Business Overhead Insurance
- Cross Purchase Insurance
- Key Person Insurance
- Buyout Coverage
- Life Insurance
- Disability

Executive Planning

- Bonus plan
- Split Dollar
- Executive Compensation (Whole life, bonuses)
- Elective Deferred Compensation Plan
- Supplemental Executive Retirement Plan

*Tuttle Wealth does not offer legal or tax advice.