

GK Wealth Management



Client Services

Investment Management

- Customized portfolios / investments
- Portfolio construction and asset allocation
- Income strategies
- Ongoing investment monitoring and rebalancing
- Risk tolerance assessment
- Selection of stocks, bonds, ETFs, mutual funds, or alternative investments
- Concentrated Stock solutions
- Stock option Planning
- Low cost Custom Indexing options
- Access to specialized alternative investments (contingent on required accreditation net worth thresholds)
- Cash management solutions

Wealth and Financial Planning

- Comprehensive financial plans
- Cash flow and budgeting analysis
- Net worth tracking
- Goal-based planning (short-, mid-, and long-term goals)

Goal monitoring
Client access to best of breed financial planning software (eMoney)
Finance organization
Charitable planning (including Donor Advised Funds)

Retirement Planning

Retirement income projections
IRA, 401(k), and pension planning
Withdrawal and distribution strategies
Social Security claiming analysis

Tax Planning (Coordination-Based)

Tax-efficient investment strategies
Capital gains and loss harvesting
Retirement account tax planning
Income Tax Planning
Strategic Tax Bracket Management
Coordination with CPAs and tax professionals

Real Estate Planning

Real Estate Advice
Real Estate Tax Planning
Cost Segregation Strategies
Professional recommendations

Estate and Legacy Planning (Coordination-Based)

Establishment of Estate Plan (Estate Guru) - *Separate fee of \$700 plus Estate Guru fees*

Estate plan reviews

Beneficiary design and updates

Trust and wealth transfer strategies

Coordination with estate attorneys

Insurance & Risk Management

Life insurance analysis

Disability and long-term care planning

Risk exposure reviews

Coordination with insurance providers

Business insurance coverage

Education Planning

College savings strategies (e.g., 529 plans)

Financial aid planning considerations

Education cost projections

Fees

Minimum annual fee

\$500/quarter

(This is in addition to advisory fees on assets)

(Fees waived once assets are greater than \$200,000)

Business & Executive Planning

- Business succession planning
- Stock option and equity compensation planning
- Retirement plan design for business owners
- Retirement Planning
- Key Personnel Planning
- Coordination with CPA/Bookkeeper on strategies and advice
- Enterprise Value Optimization

Fees (Business Owner Planning)

- Minimum annual fee **\$1000/quarter**
(This is in addition to advisory fees on assets)
(Fees waived once assets are greater than \$400,000)