EMERALD CITY FIDUCIARY GROUP

A WEALTH MANAGEMENT COMPANY

# For our Platinum clients

- Receive professional, prompt, and courteous service at all times.
- Be served by professionals who take into account your specific needs addressed through a concise investment plan.
- Go through the '24 file' process.
- Completely implement e-money® with all your accounts mapped.
- Receive a free personal financial organizer and appointment with our team to help get all of your financial documents organized into your organizer, giving you one place to look for your financial documents.
- Receive a face-to-face review to go over your plans and reports twice a year, allowing for proactive adjustments as necessary.
- During times of transition and post-transition, receive extra meetings and guidance to ensure a smooth transition.
- Have our financial team work closely with the rest of your financial “team” of professionals, such as your CPA, attorney, and banker, to ensure cooperation in working together for you. -
- Expect direct contact from our office at least once every 90 days.
- Receive an email copy of our commentary quarterly.
- Attend our regular events. We host both educational events covering topics such as Cybersecurity, as well as client appreciation events.
- Morningstar® report during reviews. (investment analysis)
- Statement of financial position (net worth) during each review.
- Cash flow statement (e-money) during each review.
- Albridge® access
- Albridge quarterly report (for RIA investors)
- Complimentary on-site shredding for personal documents.
- Technology Concierge Service where we walk you through the setup of: bookmarks, various online reporting websites, including username and passwords with secure storage, cellphone e-wallet (Applepay®, Google® Wallet, etc), plus, answer any technology questions!

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# For our Gold clients

- Receive professional, prompt, and courteous service at all times.
- Be served by professionals who take into account your specific needs addressed through a concise investment plan.
- Completely implement e-money® with all your accounts mapped.
- Receive a free personal financial organizer and appointment with our team to help get all of your financial documents organized into your organizer, giving you one place to look for your financial documents.
- Receive a face-to-face review to go over your plans and reports twice a year, allowing for proactive adjustments as necessary.
- During times of transition and post-transition, receive extra meetings and guidance to ensure a smooth transition.
- Have our financial team work closely with the rest of your financial “team” of professionals, such as your CPA, attorney, and banker, to ensure cooperation in working together for you. -
- Expect direct contact from our office at least once every 90 days.
- Receive an email copy of our commentary quarterly.
- Attend our regular events. We host both educational events covering topics such as Cybersecurity, as well as client appreciation events.
- Morningstar® report during reviews. (investment analysis)
- Statement of financial position (net worth) during each review.
- Cash flow statement (e-money) during each review.
- Albridge® access
- Albridge quarterly report (for RIA investors)
- Complimentary on-site shredding for personal documents.
- Technology Concierge Service where we walk you through the setup of: bookmarks, various online reporting websites, including username and passwords with secure storage, cellphone e-wallet (Applepay®, Google® Wallet, etc), plus, answer any technology questions!

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# For our Silver clients

- Receive professional, prompt, and courteous service at all times, from our entire team.
- Be served by professionals who take into account your specific needs addressed through a concise investment plan, that is dictated by an agreed-upon Investment Policy Statement.
- Completely implement e-money® with all your accounts mapped.
- Receive a free personal financial organizer and appointment with our team to help get all of your financial documents organized into your organizer, giving you one place to look for your financial documents.
- Receive a face-to-face review to go over your plans and reports, allowing for proactive adjustments as necessary.
- Have our financial team work closely with the rest of your financial "team" of professionals, such as your CPA, attorney, and banker, to ensure cooperation in working together for you.
- Expect direct contact from our office at least once every 180 days.
- Receive an email copy of our commentary quarterly.
- Attend our regular events, which have little to do with business, but have everything to do with enjoying our relationship and life.
- MorningStar report during reviews. (investment analysis)
- Statement of financial position (net worth) during each review.
- Albridge® access
- Albridge quarterly report (RIA investors)
- Complimentary on-site shredding for personal documents.

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# For our Bronze clients

- Receive professional, prompt, and courteous service at all times, from our entire team.
- Be served by professionals who take into account your specific needs addressed through a concise investment plan, that is dictated by an agreed-upon Investment Policy Statement.
- Completely implement e-money® with all your accounts mapped.
- Receive a free personal financial organizer and appointment with our team to help get all of your financial documents organized into your organizer, giving you one place to look for your financial documents.
- Receive a personalized review to go over your plans and reports, allowing for proactive adjustments as necessary.
- Have our financial team work closely with the rest of your financial "team" of professionals, such as your CPA, attorney, and banker, to ensure cooperation in working together for you.
- Expect direct contact from our office annually.
- Receive an email copy of our commentary quarterly.
- Attend our regular events, which have little to do with business, but have everything to do with enjoying our relationship and life.
- MorningStar report during reviews. (investment analysis)
- Statement of financial position (net worth) during each review.
- Albridge® access
- Albridge quarterly report (RIA investors)
- Complimentary on-site shredding for personal documents.

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# For our Pewter clients

- Receive professional, prompt, and courteous service at all times, from our entire team.
- Be served by professionals who take into account your specific needs addressed through a concise investment plan, that is dictated by an agreed-upon Investment Policy Statement.
- Completely implement e-money® with all your accounts mapped.
- Receive a free personal financial organizer and appointment with our team to help get all of your financial documents organized into your organizer, giving you one place to look for your financial documents.
- Receive a review to go over your plans and reports, allowing for proactive adjustments as necessary.
- Receive an email copy of our commentary quarterly.
- MorningStar® report during reviews. (investment analysis)
- Statement of financial position (net worth) during each review.
- Albridge® access
- Albridge quarterly report (RIA investors)
- Complimentary on-site shredding for personal documents.