

TIER 1

Revenue: Under \$5K

Planning Output / Services

- eMoney Tier 1 Output
- Decision Center Scenarios (when necessary)
- Enroll in SS / Medicare
- Medicare Part D Review — Email reminder sent; client executes
- Refer strategic partners — Do not sit in meetings

Proactive Touches: 1 | **Unique Touches:** None

TIER 2

Revenue: \$5K – \$20K

Planning Output / Services

- Snapshot / Playbook / Decision Center
- Enroll in SS / Medicare
- Open enrollment benefit elections
- Medicare Part D Reviews — Advisor executes
- Holistiplan / Tax Prep Worksheet to accountant
- Refer strategic partners — Join meeting when necessary

Proactive Touches: 2 | **Unique Touches:** 1

TIER 3

Revenue: \$20K – \$50K

Planning Output / Services

- Snapshot / Playbook / Decision Center
- Enroll in SS / Medicare
- Open enrollment
- Medicare Part D Review — Advisor executes
- Holistiplan / Tax Prep Worksheet
- Refer strategic partners — Join meeting
- Estate planning review with Abby Leach

Proactive Touches: 2 | Unique Touches: 2

TIER 4

Revenue: \$50K+

Planning Output / Services

- Playbook / Decision Center
- Enroll in SS / Medicare
- Open enrollment
- Medicare Part D Review — Advisor executes
- Holistiplan / Tax Prep Worksheet to accountant
- Refer strategic partners — Join meetings
- Estate planning review with Abby Leach

Proactive Touches: 2+ | Unique Touches: 2+

TIER 5

Revenue: \$50K+

Services

- Tier 4 services + LPOA
- Personal CFO

BUSINESS ADVISORY SERVICES | TIER 6

TIER 6

Non-RIA Services

- Business Consulting
 - Fractional CFO
 - Exit Planning