KAUFMAN ROSSIN WEALTH

Benefits of a Kaufman Rossin Wealth relationship

When you work with Kaufman Rossin Wealth, your interests always come first. We serve our clients in a fiduciary capacity—the highest standard in the industry.

Your dedicated Wealth Advisor leads the delivery of comprehensive services, including financial planning, investment management, and risk management solutions.

Financial Planning

We collaborate with you to develop a comprehensive financial plan that serves as the foundation for achieving your personal financial goals. This interactive process leverages advanced tools and resources, including:

- Sophisticated financial planning software that models retirement savings and spending, education funding, performance outcomes, overall net worth, and many other scenarios.
- In-depth portfolio analysis conducted prior to any investment recommendations, evaluating asset allocation, asset location, risk concentrations, and tax efficiency.
- Psychometric risk assessment for prospective clients to clarify risk tolerance and guide the investment strategy for a customized portfolio.

Learn more at kaufmanrossinwealth.com

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Portfolio Management

- Every client's investment strategy and asset allocation are documented with a written Investment Policy Statement.
- We address your overall asset allocation, risk concentration, tax efficiency and expenses using our evidence-based investment approach.
- As part of an overall investment strategy, we offer a distinctive alternative investment strategy that combines elements of both boutique-sized funds and well recognized institutional funds.
- When appropriate, our clients have access to select tax-aware investment strategies, including capital gains management.

Risk management

As part of our advanced planning capabilities, we provide risk management solutions in the form of life, long-term care, and disability insurance, as well as annuities.

- Our advisors serve as your advocate within the insurance marketplace with access to leading insurance carriers.
- We analyze your current insurance policies to ensure coverage aligns with your goals. We customize coverage that protects your family's wealth and income, and enhances your overall financial plan.
- We offer buy-sell funding, employee retention strategies, and succession planning for business owners.
- Life insurance solutions may be used for legacy planning, wealth transfer, estate liquidity, inheritance equalization, and charitable giving.

Customer Service

- Dedicated Client Service team providing ongoing support.
- Secure client portal with on–demand access to your financial plan, reports, and performance.
- Schwab and Fidelity online access to your accounts.
- Regular meetings & phone calls to help keep you informed and on track.

Other Tools and Resources

- When applicable, we collaborate with your tax professional to integrate a powerful, intuitive tax-planning software, into your financial plan.
- A convenient application to aggregate data from multiple financial accounts.
- Brokerage account that offers competitive rates and increased FDIC coverage through an entity *not* affiliated with Kaufman Rossin Wealth LLC.

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