

French Insurance & Financial Services, Inc.

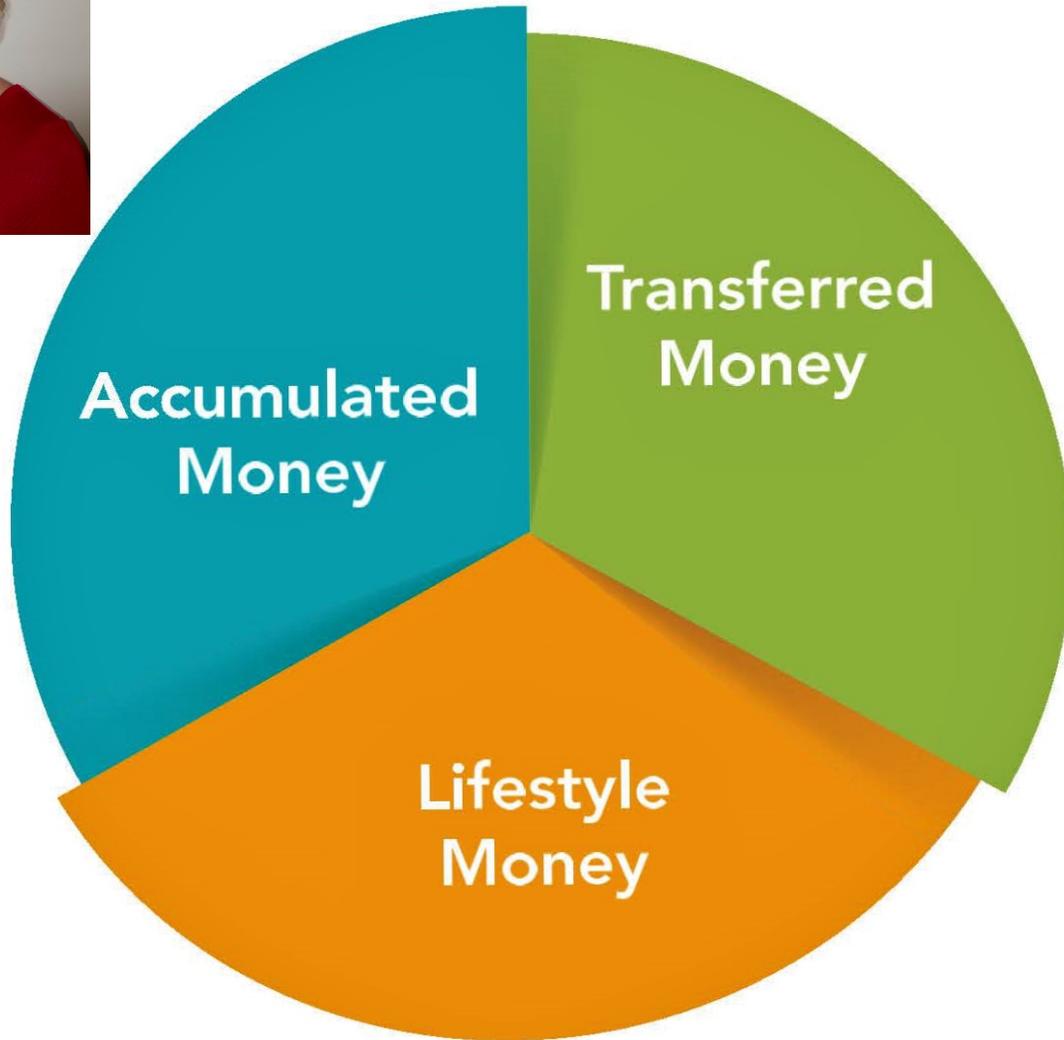
Beth G French (970) 835-3821

Determine the Services You Desire

Service Level:	AAA (\$500k+)	AA (\$250-\$499k)	A (\$0-\$249k)
PLAN			
Discovery and Goal Definition Meeting	X	X	X
Comprehensive Financial Plan	X	X	
PROTECT			
Insurance Review	X	X	X
Long-Term Care Planning	X	X	X
Asset Protection Strategies	X	X	
Investment Research and Due Diligence Reviews (Retirement Planning Fiduciary Reviews Only)	For a Fee	For a Fee	For a Fee
PRESERVE			
Social Security Planning	X	X	X
Business Succession Plan	X	X	X
Comprehensive Annual Review	X	X	X
Tax Planning (with your CPA)	X	X	
Mid-Year Progress Meetings	X		
Family/Generational Meetings	X		
Estate Planning (Considerations Only)	X		
Annual Meeting with CPA	As Requested	As Requested	
Annual meeting with Attorney(s)	As Requested	As Requested	
PROSPER			
Retirement Planning	For a Fee	For a Fee	For a Fee
Advice on assets not managed	For a Fee	For a Fee	For a Fee
Investment Management Strategies	X	X	Retirement Only
Cash Flow Analysis	X	X	X
Behavioral Financial Coaching	X	X	X
Legacy Planning	X	X	X
Account Consolidation	X	X	X
Monitoring (Managed Accounts Only)	X	X	X
Wealth Building Strategies	X	X	
Corporate Benefits Review	X	X	
PERKS			
Social Recognition Cards	X	X	X
Website Access (frenchfinancialservices.biz)	X	X	X
Special Events	X	X	X
Seminars	X	X	X



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Circle of Wealth

