



*Your Values + Your Goals
Inspire Your Success*

Jamison & Associates Available Client Deliverables

- 1) **Financial Planning** – One complete and thorough annual review per year, will include updates and implementation of any changes to your values, goals, or resources. Quarterly or semi-annual reviews are available and may be necessary for more complex situations.
- 2) **Implementation Plan** – The development, update, and maintenance for your personalized Plan of Action is required to create a financial roadmap that you will stay on track in order to help accomplish your values and your goals.
- 3) **Cash and Debt Management** – Work with you to establish an adequate cash reserve plan and cash flow in order to handle financial issues including major purchases debt repayment.
- 4) **Goals Management** – Manage and monitor of your assets for short-term and long-term goals and to track their progress.
- 5) **Risk Management & Insurance Review** – Review each kind of insurance and recommend the right types the appropriate amounts, in order to be sure there are no “coverage gaps” which might endanger your long-term financial plan. Insurance audits are available to compare coverage and help maximize your premium payments.
- 6) **Income Tax Planning** – We can coordinate with your accountant or refer you to an accounting firm to discuss with you tax efficient strategies. Business Planning is available to deal with various cash flow, taxable events and tax liability issues.
- 7) **Estate Planning** – During our first twelve months of working with you, we will work with an attorney to recommend and produce documents that align with the financial strategies of your financial plan and the personal legacy you desire.
- 8) **Organization & Reports** – We will provide binders for all your accounts and client paperwork to help you stay organized. Reports for all your accounts will be mailed to you on a quarterly basis; managed accounts will have a summary of all assets listed and tracked against market benchmarks. We also publish four quarterly newsletters per year.