

# Levels of Service



	Silver	Gold	Platinum
Informative newsletters and financial and business e-bulletins	X	X	X
Access to professional advisor network	X	X	X
Specific review of all areas of your personal financial situation	X	X	X
Risk tolerance analysis and adopting asset allocation objective	X	X	X
Written wealth management plan with annual action agenda		X	X
Access to Suncoast Virtual Planner, your family wealth management website with annual review		X	X
Access to open architecture investment consulting platform and individual strategist reports		X	X
Continuous supervision and monitoring of investment portfolio		X	X
Adopting personal and investment policy statement		X	X
Quarterly review of financial situation with specific agendas			X
Annual tax planning strategies with CPA			X
Individual consulting regarding dynamic and complex financial and business issues and strategies			X
Specialized financial and business planning for medical and dental professionals and family business owners			X
Direct access to articles, forms and templates for your business via website (password protected)			X
Daily monitoring of entire wealth management plan assumptions and goals			X
Quarterly retesting of plan assumptions and goals			X
Direct assistance working and meeting with professional advisor network			X
Direct access to advisor between client meetings			X
Annual Fees	\$2000	\$3000	\$4000

Rick O. Helbing is a Registered Representative offering securities through LPL Financial, member of FINRA/SIPC. Investment advice and advisory services offered through Suncoast Advisory Group, a registered investment advisor and separate entity from LPL Financial.

**25 YEARS**  
OF DEDICATED SERVICE

[www.suncoastadvisorygroup.com](http://www.suncoastadvisorygroup.com)

Mailing address: 15 Paradise Plaza #354, Sarasota, FL 34239

Office address: 1911 N. Lakeshore Dr., Sarasota, FL 34231

941.375.7320 Office

941.827.2916 Fax

941.320.5532 Cell

rick@suncoastadvisorygroup.com