ALLEN & COMPANY
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INVESTOR EDUCATION	FINANCIAL PLANNING	INVESTMENT MANAGEMENT	TECHNOLOGY	TAX AND ESTATE CONSULTATION	INSURANCE ANALYSIS	CASH FLOW/ BUDGETING
Multi-Generational Guidance	Goal-Based Planning	Asset Allocation	Personalized Communication Plans	Coordinating with attorneys and accountants	Review of Existing Policies	Security Backed Lines of Credit
Risk Tolerance Dialogue	Retirement Income Solutions	Country/ Region Allocation	Smart Phone App	Tax Loss Harvesting	Long Term Care Funding Solutions	Review of Income Sources
Investment Policy Statements	Social Security Analysis	Portfolio Risk Analysis	Account Consolidation (simplification)	Tax Efficient Investing	Life Insurance Needs Analysis	Systematic Investing Solutions
Time Horizon Discussion	Planned Large Expenses	Individual Stock Analysis	Account Aggregation (outside accounts)	Cost Basis Review	Liability Coverage Review	Debt Management
Stock Concentration	IRA and Roth IRA Contributions and Conversions	Fixed Income Positioning	Online Account Access	Managing High Gain Individual Stocks	Multiple Carrier Options	Mortgage Review
Monitoring of Outside Accounts (401k's)	Review of Employer Plans	Managed Account Recommendations	Screen-Share Appointments	Charitable Gifting	Annuities	Pension Analysis
Timely Investment Commentary	Self- Employed Plans	Manager Due Diligence	Interactive Website	Estate Plan Execution	Disability Insurance Analysis	Account Check Writing and Debit Card Liquidity
Investment Accounts for Children	RMD & Withdrawal Strategies	Tactical Positioning Guidance	Online Investment Blog	Account Titling		
Educational Seminars	College Savings Plans	Qualified Employer Plan Establishment/ Management				