Excelsior Wealth Partners

What is included with your Client Fee?

- Portfolio Management – Investment Process
- Pre and Post Retirement Planning
- Access to Private Investments
- Quarterly Reviews
- Ongoing Direct Financial Advisor Access
- Financial Planning Questions
- Annual Tax Returns/Ongoing Tax Planning
- Client Appreciation Events
- Safeguards for your Spouse
- Safe Distribution Strategies
- Estate Planning/Settling Assistance
- Social Security / Pension Planning
- Tax Savings Strategies
- Asset Protection Planning
- Medicare Planning
- Nursing Home Planning