CAPITAL INSIGHT
FINANCIAL GROUP

Freedom to be Inspired ®

Managing investments requires detailed attention to individual and family goals and immediate needs. Performance is always a focus but within reason of risk tolerance and principal protection. In any client relationship the basic principles of financial planning and investment management come standard. Additionally, based on the assets you entrust for management with Capital Insight Financial Group, more focused services and attention become included.

Core Investment Management
$250,000 in Investable Assets

- Goals and objectives review
- Custom analysis of risk tolerance
- Investment management agreement
- Overall net worth analysis
- Cash flow and budget review
- Asset allocation review
- Portfolio rebalancing
- Portfolio performance reporting
- Tax and cost-basis reporting
- Financial plan development*
- Financial plan updates
- Roth conversion planning

Financial Planning
$500,000 in Investable Assets

- Comprehensive financial plan*
- Business/**Family** balance sheet review and analysis
- Retirement needs analysis
- Income distribution strategies
- Social Security timing
- Education planning and funding
- Tax planning (Analysis report)
- **Roth Conversion Strategies**
- Comprehensive insurance planning
- Estate planning services
- Consolidated online account access (Emoney)

- **Core Investment Management**

Comprehensive Wealth Management
$1,000,000 in Investable Assets

- Strategic planning for wealth conservation
- Charitable gifting strategies
- Trust creation and asset integration
- Tax-optimized investing and giving
- Executive compensation planning for:
  – Deferred compensation
  – Stock options
  – Concentrated portfolios
- Business financial planning
- Annual financial plan updates

+ Financial Planning

+ Core Investment Management

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Financial freedom is realizing you have a choice

Assets Under Management	Advisor Fee
Under $250,000	1.00%
$250,001 - $500,000	.90%
$500,001 - $2,000,000	.85%
$2,000,001 - $5,000,000	.75%
$5,000,001 +	.50%

*** Please note that additional platform or investment strategist fees may apply in addition to the Advisor Fee and will vary depending on the specific platform or strategist.**

Additional Services	Rate
Financial Plan for clients with < $500k in assets	$2,200 ~ $3,500
Financial Plan through family/client referral	$1,500 ~ $2,200
Financial advice billed hourly (reports included)	$350 p/h

*** Financial plan fees can vary based on the complexity and scope of the plan.**