MYERS CAPITAL MANAGEMENT

REFOCUSING YOUR FUTURE

Client Advisory Services

Silver Clients With Assets \$250,000 - \$500,000	Gold Clients With Assets \$500,000- \$1,000,000	Platinum Clients With Assets Over \$1,000,000
▪ Review Investment Goals and Objectives ▪ Risk Tolerance Analysis ▪ Asset Allocation Strategies With Rebalancing ▪ Investment Policy Statement ▪ Online Investment Portal Access ▪ Portfolio Performance Reporting ▪ Tax and Cost Basis Reporting ▪ Net Worth Tracking ▪ Values Based Investing Available ▪ Investment Review Meetings: **Semi-Annual** ▪ Additional Client Requested Meetings: **One** ▪ Prompt Phone/Email Response to Questions ▪ Weekly Updates Via Myers Cap Posts On Website ▪ Quarterly Economic Web Review	All Services Provided to Silver Clients Plus… • One Additional Client Requested Meeting	All Services Provided to Gold Clients Plus… • Quarterly Investment Review Meetings • Family Meetings • Custom Portfolio Strategies
• Financial Life Planning Services: Additional Fee • Tax Return Preparation Services: Additional Fee • Insurance Services Available	• Financial Life Planning Services: 50% Discount • Tax Return Preparation Services: Additional Fee • Insurance Services Available	▪ Personal Financial Website ▪ Charitable Giving Plans ▪ Banking, Loan, and Trust Services ▪ Financial Life Planning Services: Complimentary ▪ Tax Return Preparation Services: Additional Fee ▪ Insurance Services Available