WEALTH MANAGEMENT SERVICES

STRONG THOMPSON & ASSOCIATES
WEALTH MANAGEMENT

Our Approach

The professionals at Strong Thompson & Associates Wealth Management LLC specialize in providing comprehensive wealth management services to individuals, families and business owners. We are committed to serving our clients as unique partners, requiring individual solutions and well thought out strategies to empower them to make their own decisions. Above all else, we value the relationships and trust that we build.

Financial Planning Services

We offer our clients a holistic financial planning approach to help them maintain overall financial health and work toward multiple financial goals. Whether it's a more comprehensive financial plan or a specific planning need, our services always align with your current priorities, including ongoing review and monitoring.

Investment Management Services

We understand your many investment needs and utilize timely and appropriate wealth management strategies to pursue both short and long-term goals. As an investment fiduciary, we also provide specialized, objective and independent advice, putting your needs and best interests first.

Financial Planning Packages

Basic Financial Plan Answer simple questions and get you organized for your financial future	**Monitoring and Planning** Advice for investments held in company benefit plans	**Advanced Planning** Take complete control of your financial and build your legacy
Meetings: 2-3	Meetings: Annual	Meetings: Annual
Basic Retirement Plan Social Security Review Life Insurance Review LTC insurance Review Investment Review GPM – 2-3 what if scenarios and behavioral financial coaching	**Tier 1 Plus:** Investment analysis with reviews of other available investments in plan. Development of risk changes based on market and your age toward your goals Goal Monitoring annually	**Tier 2 Plus:** Family Financial Education Charitable Giving Business Succession Planning Income Tax Planning
Initial Plan: $650.00 *Available for one review in 12 months.*	*Initial Plan: $1,500.00* *Ongoing Planning: $150.00/month*	*Initial Plan: $3,000.00* *Ongoing Planning: $200/Month*

Project Based Planning

While many clients choose from one of our planning packages, we recognize that you may desire more customized support and advice. Our planning services are available for $270.00/hour and can choose from topics listed above or choose your own focus area. Hours will be estimated and proposed on a project by project basis, prior to the start of any work.