CWP | PRIVATE WEALTH MANAGEMENT

50 Services To Offer Clients

Tasks	Advisor Can Do	Advisor Does	Advisor Verifiable	CWP Does	CWP Verifiable
Guide clients to think about many areas of financial life	X				
Formalize financial goals and put them into writing	X				
Help prioritize financial opportunities	X				
Prepare financial plans	X				
Review tax returns	X				
Help with SSI income planning	X				
Recommend life insurance where appropriate	X				
Assist in setting up company retirement plan	X				
Review and assist estate planning	X				
Review and assist 529 plans	X				
Provide reminders about key financial data	X				
Provide ways to fund health care during retirement	X				
Work with tax advisors	X				
Work with attorney's	X				
Proactively keep in touch with the client	X				
Provides referrals to other professionals	X				
Provide relevant experience working with others with similar financial circumstances	X				
Identify savings shortfalls	X				
Develop and monitor debt reduction	X				
Stay up to date on tax laws	X			X	X
Help clients reduce income taxes	X			X	X
Move all clients out of the market in one day	X			X	X
Stay up to date on changes in the financial services industry	X			X	X
Prepares IPS	X			X	X
Determine RMD's from IRA	X			X	X
Model portfolios	X			X	X
Monitor all accounts daily	X			X	X
Trades all client accounts	X			X	X
Actively manage client portfolios	X			X	X
Forecast income distributions from portfolio during retirement	X			X	X
Record and research cost basis on holdings	X			X	X
Provide clients with unbiased investment research	X			X	X
Determine clients target risk level	X			X	X
Consolidate and simplify investments	X			X	X
Aggregate all investment accounts to one statement	X			X	X
Provide clients account statements	X			X	X
Reposition investments with tax law changes	X			X	X
Facilitate transfers of assets from brokerage to trust accounts	X			X	X
Focus on keeping investment management costs low	X			X	X
Inform clients monthly as to why the market is moving	X			X	X
Minimize forms for investment changes	X			X	X
Provide clients web portal of aggerated statements	X			X	X
Provide clients monthly market comment	X			X	X
Maintain client contributions and distributions	X			X	X
Assist with changing beneficiaries on accounts	X			X	X
Manage client assets in 401k ,457, 401(a), and Profit Sharing	X			X	X
Report on assets held away	X			X	X
Bill on assets held away	X			X	X
Return client calls for account servicing	X			X	X
Perform reseach on clients behalf for specific investments	X			X	X