

Senior Money Tree

Basic Client Data

Full Name		
Street Mail address		
Email address		
Date/of birth		
Business manager/CPA/trusted professionals		
Best contact/Number		
Best time period to contact <i>Give options if possible</i>		
Special circumstances /considerations		
Policy Data: Insured Name	ID Number	Company Name
	1.	
	2.	
	3.	
	4.	

Confidentiality ◀

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All information submitted is on an exclusive confidential basis. Our staff and financial analysts are bound by confidentiality agreements. Information received on those who do not become clients is purged from our system via shredders and Schrader software at the end of a 90 day period unless written requests are received to extend or destroy differently.

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	5.
	6.
	7.
	8.

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What we do

1. Upon receipt of download information, Authorization Release and retainer
2. Open a file for you
3. We review for completeness and call to get any missing items.
4. Transfer your information into each company's request for information along with our specific requested data sheet.
5. Either Fax or mail to the companies. This often requires follow up phone calls and resending requests.
6. Upon receipt transfer information into our own formatted files.
7. Our analysis's then begin cross referencing your policies with our company database looking for updates, options, enhancements and offers.
8. Compile your written report with suggestions and recommendations.
9. Telephone you to review your report as you are viewing it.
10. Implement changes if requested and retained.

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What we Need

1. The basic data in the request forms
2. The Release of information for insurance companies. Some companies will send the same information to you simultaneously for consumer protection. Some may even call to get additional authorization.
3. The fee and or retainer.

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Service Levels

Fee structure for analysis of products & Planning

Fees are paid in full for levels I-IV to begin work. You may use our PayPal online secure service. That also gives you assurance of fraud protection from us as a vendor. Work is completed in a normal time frame of 30 days. Occasionally we encounter difficulty with company cooperation even though we are authorized to act on your behalf to obtain data. It is rare but on occasion we must have our client communicate directly with an insurer.

I. Review current portfolio supply written report, conference call with client to explain 45min. to 1 hour. Fee: \$350

II Review current portfolio, Make recommendations, gather and compare available alternatives and submit in written form, conference call with client. Fee: \$475.

III Review current portfolio, Make recommendations, gather and compare available alternatives. Review with other advisors, conference with client and advisors. Fee: \$650

IV Review current portfolio, Make recommendations, gather and compare available alternatives. Review with other advisors, conference with client and advisors. Provide all implementation and change paperwork, underwriting to secure offers. Fee \$750. If commissions are involved by a company and paid to our advisors, the fee will be reduced to our minimum flat fee.

V Project: this option may include a flat fee as an estimate where comprehensive financial planning, tax strategy planning or charitable planning is involved. This would include all components of Level IV plus planning and all implementation. The Fee is dependent on

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nature and size of project. Normally it ranges \$10,000-15,000. Legacy Planning and Family business transition planning may be implemented over several years and fees would be charged accordingly.

In an effort to retain objectivity we use the fee approach. However, we often experience a client requesting that we act on their behalf to implement changes and additions. In these cases we will discount the fee if a company pays implementation fees or commissions to us.

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