RDFA

Ritter Daniher Financial Advisory, LLC

Fee Only Advisors – Trusted Fiduciaries

WEALTH MANAGEMENT SERVICE CHART

■ Indicates service offered internally by RDFA professionals

□ Indicates work done by others, which is facilitated by RDFA

SERVICE DEPTH LEVEL	DISCUSSION/EDUCATION	VERIFICATION	RECOMMENDATION	IMPLEMENTATION
Scope of Engagement Determination of Initial Priority Items	■	■	■	■
Goal Clarification/Establishment Balance Sheet Prepared Legacy Planning	■	■	■	■
Discretionary Asset Management Investment Policy Statement Asset Allocation Process Reporting/Review Schedule	■	■	■	■
Financial Planning Retirement Projections College Projections	■	■	■	■
Cash Flow Planning Major Purchase Budget/Debt Management Credit Review	■	■	■	■
Income Tax Planning Tax Return Review/Discussion Integration with Tax Preparer	■	■	■	□
Estate Planning Document Review/Discussion Integration with Attorney	■	■	□	□
Insurance Planning Health Insurance Life Insurance Property/Casualty Insurance Disability Insurance Long-Term Care Insurance	■	■	□	□
Employee Benefits Corporate Retirement Plans Group Life/Health/Disability Deferred Compensation/Stock Options	■	■	■	□
Fiduciary Education Individual Trustee Issues	■	■	■	□