

Service Level Comparison



	Allos Allos+	Searcy
Advisor Access & Communications		
Access to Team of Advisors	✓	✓
24/7 Performance Access (Online & Mobile App Capabilities)	✓	✓
Market & Economic Update Memos	✓	✓
Connections to Professionals in Various Industries (e.g. Accountant, Attorney, Mortgage Lender, Career Coach)	✓	✓
Investment Management		
Discretionary Investment Management (Active Portfolio Management & Diversification)	✓	✓
Financial Planning		
Identification of Financial Goals (e.g. Saving for Retirement, Debt Reduction)	✓	✓
Budgeting & Cash Flow Planning	+	✓
Retirement Income Planning & Retirement Coaching (Required Minimum Distributions, Roth Conversions, Charitable Giving Strategies)	+	✓
Education Planning (College Funding Analysis)	+	✓
Identification of Personal Goals (e.g. Vision & Ideal Life)		✓
Behavioral Finance Coaching		✓
Insurance Planning (e.g. Life, Disability, Long Term Care)		✓
Estate Planning Review (e.g. Wealth Transfer, Asset Protection, Generational/End-of-Life Planning)		✓
Situational Planning (e.g. Business Planning, Divorce, Special Needs, Charitable Planning)		✓
Life Transition Conversations (Collaborative Conversations Surrounding Your Unique Goals and Transition Events)		✓
Accountability Partner (Helping You Stay on Track to Meet Your Goals)		✓
Ongoing Monitoring of Financial Plan		✓

See Allos Fee Schedule for Summary of Asset Management Fees and Allos+ Financial Planning Fees

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