

My Service Commitment

My Commitment to your Service

My Mission is to help you pursue your financial goals by delivering consistent quality financial advice and service.

The focus is to help you grow and protect your wealth (net worth) because wealth rather than income is what supports your retirement and other goals.

My commitment to you includes, but is not limited to, all the services reflected on the right.

Please be sure to let me know of any additional services you anticipate, or if you have any questions or comments.

Thank you for your business and your valuable ongoing relationship.

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Registered Investment Adviser
 (California)

Current ongoing services you receive throughout the year

<input checked="" type="checkbox"/>	An "Open Door" approach	Calls & Meetings
<input checked="" type="checkbox"/>	Planning Approach emphasizing processes rather than sales & products	Calls & Meetings
<input checked="" type="checkbox"/>	Application of reading and research to your unique situation	Calls & Meetings
<input checked="" type="checkbox"/>	Meetings at your convenience	Office/phone/webex
<input checked="" type="checkbox"/>	Personalized financial advice	Calls & Meetings
<input checked="" type="checkbox"/>	Timely response to you	Within 24 hours
<input checked="" type="checkbox"/>	Plan development w/ website access #	Ongoing
<input checked="" type="checkbox"/>	24/7 plan access via internet #	Ongoing
<input checked="" type="checkbox"/>	Plan updated on website as your situation changes and as you require #	Ongoing
<input checked="" type="checkbox"/>	24/7 Account access via internet #	Ongoing
<input checked="" type="checkbox"/>	Annual review or review reminder	Annually
<input checked="" type="checkbox"/>	Application of Retirement Decision Rules	Ongoing
<input checked="" type="checkbox"/>	Application of withdrawal rate research once retired	Ongoing
<input checked="" type="checkbox"/>	Quarterly Newsletter & Summary Statements (by Loring Ward, my back office service & support team)	Quarterly
<input checked="" type="checkbox"/>	Portfolio & website service by Loring Ward	Ongoing
<input checked="" type="checkbox"/>	Online directory to other key professionals & services #	Ongoing
<input checked="" type="checkbox"/>	Informational Seminars by invitation only	Bi-annual
<input checked="" type="checkbox"/>	Thanksgiving, Christmas & New Year thank you letter.	Annual
<input checked="" type="checkbox"/>	Birthday card.	Annual

- through my website's consolidated portal page
 "Current Client Resources"