



Compare

Our Services

Financial Planning	Millennial Wealth	Insurance Company	Robo Advisor	Wirehouse Advisor	Do It Yourself
Cash Flow Analysis	x	x		x	
Tax Planning	x				
Tax Return Analysis	x				
Tax Filing	x				x
Goals-Based Planning	x	x		x	
Retirement (Financial Independence) Planning	x	x		x	
Facilitate Communication with Professionals (attorneys, realtors, mortgage lenders, etc.)	x	x		x	
Charitable Giving Strategies	x	x		x	
Equity Compensation Plan Analysis	x				
College Planning	x	x		x	
Estate Planning	x	x		x	
Employee Benefits Optimization	x				
Insurance Advice (health, life, disability, property & casualty)	x	x		x	
Debt Management	x	x		x	
Job Offer Review	x				
Real Estate Purchase Analysis	x				
Signed Fiduciary Agreement	x				
Fee Only (no commissions)	x				
Investment Management					
Behavioral Finance Coaching	x	x		x	
Simplify and Consolidate Accounts	x	x	x	x	x
Integrate 401(k) Accounts into Overall Investment Strategy	x				
Rebalancing	x	x	x	x	
Tax-Loss Harvesting	x	x	x	x	x
Tax-Efficient Placement of Investments (asset location)	x	x	x	x	
Low Cost Investments	x		x	x	x
Risk Management and Analysis	x	x	x	x	
Alternative Investment Advice (digital assets, private equity, private lending, etc)	x			x	

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