

Value-Added Client Service Platform



FULTON FINANCIAL ADVISORS™

[FA Name]

Vice President/Financial Advisor

Determine that the thing can and shall be done, and then we shall find the way. Abraham Lincoln

While we always strive to provide you with a comprehensive, integrated financial plan we feel the need to go one step further in order to provide a truly personalized experience.

Therefore, we have developed a Value-Added Client Service experience.

Annual & Semiannual Financial Plan and Investment Review

- Financial and Estate Plans are reviewed and updated as needed
- Investment Policy Statement questionnaires reviewed
- All plan documents, profiles and data are reviewed and updated
- Investment performance is measured and compared to both the indexes and the goals of your plan
- Recommendations from attorneys, accountants or other financial providers are incorporated into your plan

Periodic Performance Review

- Portfolio performance is reviewed
- Performance reports are continually available
- Any changes or updates to your current situation are discussed

Access to Our Partners

- Life Insurance and Long Term Care Insurance
- Estate Planning Analysis
- Insurance Specialists
- Credit and Lending Advisors
- Mortgage Banker
- Commercial Banker

Continuing Education

- Newsletter – Articles and commentary regarding the current investment environment and marketplace
- Publications concerning personal finance are available

Annual “Accountant-Ready” Tax Packages

- 1099s are prepared and compiled with a summary and details of any gains or losses taken during the year
- Helps reduce your – and your accountant’s – annual tax preparation workload

Year End Capital Gains Tax Adjustments

- We attempt to minimize your annual investment taxes – both within your portfolio and from other investments – by realizing necessary losses (if any) at the end of each year to offset any realized gains
- We coordinate this effort with you and your accountant to help your investments work in tandem

Fulton Financial Advisors

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