We provide online access so our clients can view their portfolio and it's performance any time, any place. Below are a few examples of reports available to our clients in paper format and/or online:

- Performance Report - View performance for each account and/or your entire household.

- Performance Report - For clients in the withdrawal phase and utilizing our "bucket" approach. This report also breaks down your returns on your short term, mid term, and long term investments.
- Financial Plan - Are you on track to meet your goals?
- Social Security Analysis - After reviewing all the possible strategies side by side, this customized report gives the client the recommended strategy with precise information on what to file and when.
- Tax Information Report - Consolidated report which shows realized gain/loss, income, dividends, interest, and fees.
- Monthly Statement - Sent to the client from their custodian (Schwab, TD Ameritrade, etc.)