



THE BLISK FINANCIAL GROUP

SIGNATURE SERVICE

SERVICE STANDARDS

- Independent unbiased advice
- Service team dedicated to maintaining consistency of service
- Internal standards to solve problems quickly
- Periodic reviews (2-4 times per year as needed)
- Review of corporate benefits (401k, deferred comp, stock awards and options, flex spending options, etc.)
- Coordination with CPA at tax time, attorney when needed, other professionals
- Dedicated service email bfgservice@spireip.com

REVIEW PROCESS

- Proactive portfolio reviews
- Mortgage review and analysis
- Insurance evaluation (life, disability, long term care, etc.)
- Advanced estate planning (coordinated with attorneys/CPA)
- Customizable charitable giving strategies
- Business planning specialists
- Check-in discussions (periodic check to determine what's working)
- Review full capabilities of firm to uncover new opportunities

CLIENT COMMUNICATION

- Market Updates by quarterly commentary emails
- Respond quickly to client calls and requests
- E-Communication
- Online account access arranged by service team
- Online research – account reports, socks, mutual funds, fixed investments
- Personal, proactive calls
- Provide administration guidance on retirement plans and executive benefits
- 1st quarter statement and account review with service team

EDUCATIONAL EVENTS

- Family (Inter-generational) meetings: Educate other family members on their situation where appropriate
- Monthly client educational events: teleconferences on important topics regarding financial planning and investments
- Semiannual offsite education workshops on timely planning and investment topics