CROAK CAPITAL

WEALTH MANAGEMENT

- Annual Capital Review
- Tailored Quarterly Net Worth Report
- Account Aggregation and Data Analysis
- Monthly Market Commentary & Attribution
- Secure Document Vault & Storage
- Cash Management & Budgeting
- Held-away Account Management

INVESTMENT ADVISORY

- Executive Portfolio Series
- Custom Investment Policy Statement (IPS)
- Ongoing Risk Monitoring & Stress Testing
- Custom Tax-Aware Portfolio Construction
- Portfolio Lending Options
- Access to Private Market Investments
- Sustainable & Impact Investing Opportunities

RISK MANAGEMENT & INSURANCE

- Comprehensive Annual Insurance Audit
- Policy Coordination & Broker Selection
- Claims Management & Documentation
- Medicaid/Medicare Advisory Coordination

ESTATE & LEGACY PLANNING

- Multi-Generational Wealth Transfer Strategies
- Trust & Estate Analysis
- Philanthropic & Family Foundation Planning
- Attorney Coordination and Execution

FINANCIAL PLANNING

- Scenario Modeling & Stress Testing
- Dynamic Cash Flow Analysis
- Debt Optimization Strategies
- Net Worth Projections
- Interactive Plan Adjustments
- Goal Tracking and Updates
- Social Security Optimization
- College Education Planning
- Annual Family Briefing

TAX OPTIMIZATION

- Advanced Tax Deferral Strategies
- Form 1040 and 1065 Review
- Roth Conversion Scenario Testing
- CPA / Accountant End of Year Tax Coordination
- Quarterly Tax Optimization Check-Ins

FAMILY OFFICE

- Advanced Tax Deferral Strategies
- Bill Pay

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