

Foundations of Wealth Management



Wealth management goes beyond managing money. At Green Oak, we take the time to understand your values, priorities and goals, so we can coordinate the strategies that support your financial life.

- **Investment Management**
 - Investment advisory and brokerage services
 - Public and private market investment solutions
 - Portfolios that align with your personal plan
- **Retirement Planning**
 - Clarifying what your ideal retirement looks like
 - Retirement income & cash-flow planning
 - Guidance on Required Minimum Distributions
- **Tax Strategies**
 - Tax-efficient investment management
 - Multi-year, forward-looking tax strategies
 - Charitable giving strategies
- **Estate & Legacy Strategies**
 - Ensuring proper titling of accounts and assets
 - Beneficiary and transfer-on-death designations
 - Trust, estate tax, and gifting strategies
- **Insurance & Risk Management**
 - Identifying risks and evaluating insurance needs
 - Analysis of existing insurance policies
 - Provide life, long-term care, and disability insurance
- **Professional Collaboration**
 - Collaboration with your CPA, attorney, and other professionals
 - Serving as a trusted first call for all financial decisions
 - Connecting you with vetted professionals when specialized expertise is needed
- **Multi-Generational Family Planning**
 - Coordinating with immediate and extended family for continuity and efficiency
 - Helping the next generation build financial knowledge
 - Facilitating family financial conversations
- **Business & Asset Exit Planning**
 - Pre-sale planning and tax-efficient exit strategies
 - Liquidity and investment planning post-sale
- **Lending Strategies**
 - liquidity through securities-based lending
 - Relationship-based mortgage pricing through Wells Fargo
 - Evaluating borrowing or maintaining debt versus liquidating investments
- **Social Security & Medicare**
 - Education on Social Security and Medicare
 - Social Security claiming strategy analysis
 - Medicare premium and IRMAA planning
 - Coordination with Medicare insurance agents
- **Employee & Executive Compensation**
 - Planning for equity compensation: RSUs, stock options, and stock purchase plans
 - Guidance on employer retirement plans
 - Integrating compensation tax and investment strategy
- **Education Planning**
 - Estimating education costs and savings targets
 - Guidance on education savings vehicles
 - Balancing education funding with other goals

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