RHAME & GORRELL
WEALTH MANAGEMENT

- Social Security Optimization
- Portfolio Assessment
- Estate Planning Analysis
- Personalized Asset Allocation
- Tax Optimization Analysis
- Investment Risk Analysis
- Long-term Care Study
- Estate Planning Analysis
- Retirement Cash Flow Plan
- Roth IRA Analysis
- Insurance Analysis
- Annuity vs. Lump-Sum Analysis
- NUA Optimization Analysis
- Monte-Carlo Evaluation

THE

RGWEALTH

COMPREHENSIVE FINANCIAL PLAN

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WEALTH MANAGEMENT

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What We Do: The Rhame & Gorrell Service Model

When you become a client of our firm, you become part of the RGWM family. We provide a thorough and comprehensive menu of services to address every client's unique needs.

We offer solutions for all aspects of your financial life, such as:

A Customized Financial Plan
A plan for every stage of your financial life cycle from the accumulation phase to the distribution phase

Diligent Investment Management and Monitoring of your Portfolio
Every client receives a custom strategy hand-crafted by our Rhame & Gorrell Investment Management team - both for your assets with us as well as your 401(k) through your employer or other employer plan.

Employer Benefits Optimization
We help you understand employer benefits like your 401(k), Pension, Stock Options, Deferred Compensation, and Health Insurance

Tax Management and Tax-Loss Harvesting
Dealing with taxes is fundamental to our philosophy- we work closely with your CPA to achieve optimal tax outcomes

Estate Planning Consultation
We will work to understand your estate planning needs and develop a plan to protect your family and heirs

Behavioral Finance Coaching
Nothing can derail a long-term plan faster than impulse decisions- our advisors help you stay on track towards your goals

Regular Communication & Updates
Each month, we deliver thought leadership on what our team is seeing in the market, helping our clients focus on the important economic gauges, not the white noise

Withdrawal Optimization Strategies
We advise clients on spending strategies, Social Security optimization, Roth conversions, etc.

And much, much more! This covers much of our service model but is by no means an exhaustive list.

Feel free to contact our team with questions.