

Compare Plans

	Investment Services \$100K to \$200K Investment Assets	Wealth Management Over \$200K to \$1M Investment Assets	Private Client Over \$1M Investment Assets
Financial Guidance			
Financial planning tools	✓	✓	✓
Financial advisory team	✓		
Two dedicated financial advisors		✓	✓
Access to specialists		✓	✓
Access to Investment Committee			✓
Advisory Services			
Financial and retirement planning	✓	✓	✓
Investment review	✓	✓	✓
Financial decisions support (including insurance, home, finance, stock options, and compensation)		✓	✓
Wealth planning (estate, tax, and legacy)			✓
Private equity and hedge fund review			✓
Access to private banking services			✓
Investment Services			
Personal Strategy® and Smart Weighting™	✓	✓	✓
Portfolio monitoring and rebalancing	✓	✓	✓
Tax optimization	✓	✓	✓
Portfolio customization		✓	✓
Estate, tax and legacy portfolio construction			✓
Portfolio Implementation			
Exchange-traded funds (ETFs)	✓	✓	✓
Individual stocks		✓	✓
Individual bonds* and private equity investments**			✓

* In certain situations.

** Available to certain qualified clients that meet suitability requirements and have \$5 million or more invested with Personal Capital.