Zeniki vs Others Firms

ZENIKI WEALTH

Service Offerings	Zeniki	Other Firms
Financial Planning		
Comprehensive Financial Plans	✓	✓
Management of Retirement Goals	✓	✓
Budgeting and Cash Flow Management	✓	✓
Scenario and “What-If” Analysis	✓	✓
Insurance Management & Review	✓	✓
Debt Management and Consolidation Strategies	✓	✓
Social Security Optimization	✓	✓
Roth Conversion Optimization	✓	✓
Education Savings Strategies	✓	✓
Retirement Withdrawal Strategies	✓	✓
Basic Tax Planning		
Investment Location Strategies & Optimization	✓	✓
Tax Loss Harvesting	✓	✓
Basic Investment Management		
Management of Publicly Traded Investments (Only)	✓	✓
Automated, Non-Customized Reports for Publicly Traded Investments	✓	✓
Basic Estate Planning		
Document Review for Gaps or Ambiguities	✓	✓
Account Review for Proper Beneficiary Designations	✓	✓
Charitable Giving Strategies	✓	✓
Comprehensive Tax Planning		
Detailed Tax Forecasts Years in Advance (Down to the Line Item)	✓	✘
Unique, Non-Traditional Tax Advantaged Strategies	✓	✘

Service Offerings	Zeniki	Other Firms
Comprehensive Investment Management		
Management of Your Entire Wealth (Public, Private & Alternative Investments)	✓	✘
Customized & Comprehensive Reporting for Public, Private & Alternative Investments	✓	✘
Comprehensive Estate Planning		
Trust Type Comparison & Analysis	✓	✘
Trust Set-Up, Management & Administration	✓	✘
Will & Trust Document Drafting/Review	✓	✘
Estate Tax Reduction Strategies	✓	✘
Business Owner Services		
Tax Minimization Strategies for Business Sales	✓	✘
Legal Structure Recommendations	✓	✘
Business Valuations	✓	✘
Corporate Document Drafting/Review	✓	✘
Cash Flow Analysis & Projections	✓	✘