



**KAM***South*  
*we build wealth*

# PRIVATE CLIENT SERVICES

Investing for a Lifetime of Income  
to Create a Secure Retirement

**KAM South, LLC** Christian Koch, CFP®  
1040 Riverside Trace, Atlanta, Georgia 30328  
(404) 843-3745 • Christian@KAMSouth.com • www.KAMSouth.com

## BRONZE

below \$250,000

## SILVER

\$250,000–\$499,999

### Financial Plan Light

*This financial “Check-up” is a one-page report of specific action recommendations based on input from the completed Confidential Client Profile.*

*The goal is to help improve your financial situation immediately.*

- 30-Minute annual review via conference call
- Unlimited phone calls and emails to the office
- Annual retirement plan review
- Risk management and retirement income analysis
- Investment statement familiarization
- Beneficiary designation review

### Focused Financial Plan + Tax Strategy

*This plan includes the financial “Check-up” + additional focus on Long-term Tax Planning to make solid decisions to save on cash taxes; increase deductions to reduce taxable income.*

- Annual review at our office
- Unlimited phone calls and emails to the office
- Semi-annual company retirement plan review
- Risk management and retirement income analysis
- Investment statement familiarization
- Beneficiary designation review
- Comprehensive financial planning
- Phone calls and emails returned by the end of the following business day
- Customized financial planning alert package

**GOLD**  
\$500,000–\$1,000,000

**PLATINUM**  
above \$1,000,000

### **Detailed Financial Plan + Detailed Tax Strategy**

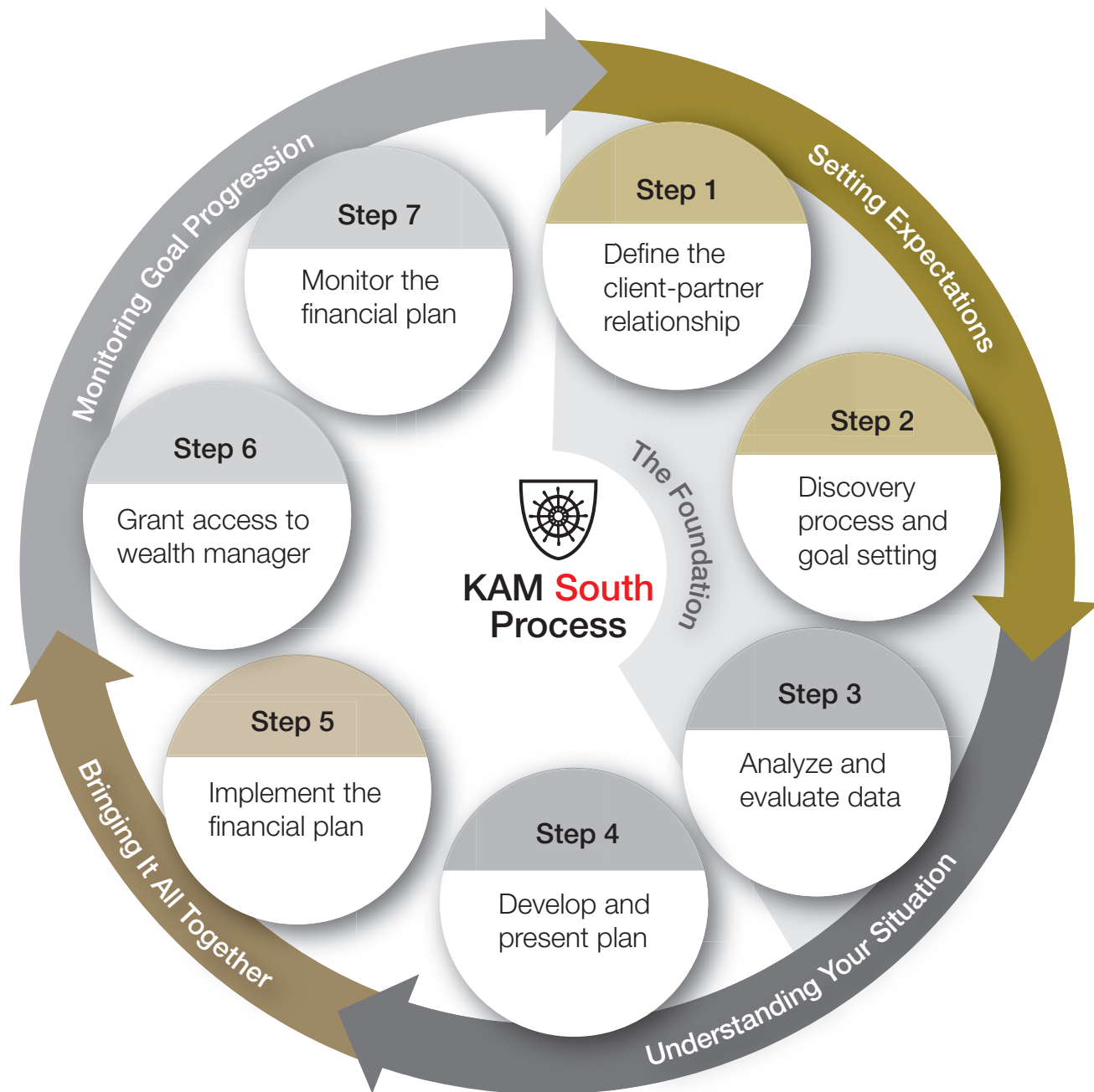
*This “Full Court Press” is a 10-15 page document that outlines your financial “road map” to achieve additional long-term financial goals.*

- Semi-annual review at our office
- Unlimited phone calls and emails to the office
- Semi-annual company retirement plan review
- Risk management and retirement income analysis
- Investment statement familiarization
- Beneficiary designation review
- Comprehensive financial planning
- Phone calls and emails returned by the end of the following business day
- Customized financial planning package
- Semi-annual “touching base” phone call

### **Detailed Financial Plan + Detailed Tax Strategy + Invitation to ALL Client Appreciation Events**

*Includes all benefits of prior levels, plus added personal attention to all aspects of your financial plan.*

- Semi-annual review at our office
- Unlimited phone calls and emails to the office
- Quarterly company retirement plan review
- Risk management and retirement income analysis
- Investment statement familiarization
- Beneficiary designation review
- Comprehensive financial planning
- Phone calls and emails returned the same day if received prior to 2pm
- Customized financial planning package
- Bi-monthly “touching base” phone call
- Personalized investment consulting



All services provided will be at the discretion of KAM South, LLC. KAM South may, at any time, choose to increase or decrease the services provided, at any given service level, for any client. The asset ranges refer to assets managed by KAM South and excludes outside assets held at other firms.

Comprehensive Financial Planning can include all, or only specific parts of, the financial planning process (Risk Management, College Planning, Investment Management, Retirement Planning, Tax Reduction Strategies and Estate Planning). We reserve the right to determine what parts of the planning process will be provided to clients on a case by case basis.

The decision to host client appreciation events on an annual basis is at the discretion of KAM South. The type and number of events each year can vary and may include, or not include, those listed.

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