4400 N. High St. Suite 412
Columbus, OH 43214
(614) 328-9319

How do our services compare?

Most professionals—doctors, lawyers, even barbers—must meet strict requirements before they can practice. But almost anyone can call themself a 'financial advisor' or 'wealth manager.' Increasing the confusion, advisors come with a variety of credentials, offer widely different services and are compensated in a variety of ways. Lastly, some advisors are legally required to offer advice in their client's best interest (fiduciaries) while others must act in the best interest of their employer or the companies whose products they sell.

We are different.

We are **fee-only** which means our clients pay us directly so we can focus exclusively on finding the best solutions for them. We do not accept commissions or any outside compensation. Because you pay us, we work only for you: objective advice, not a sales pitch. And, yes, we are fiduciaries.

Furthermore, our fee is not based on a percentage of your wealth. Instead we charge a flat fee tailored to your individual circumstances. We have no minimum wealth requirements.

Finally, we offer **comprehensive** advice. Your financial life is bigger than Wall Street so we go far beyond stocks and bonds. By offering an extensive range of services, we can coordinate all aspects of your financial life so everything works together to support your dreams.

KEY — **ALWAYS ✓✓✓** — **SOMETIMES ✓✓** — **RARELY ✓**

Category	Partnership Financial	Other Fee-only Planners	Fee-based Planners	Stock Brokers	Insurance Agents	CPA, Tax Accountants
Portfolio & Net Worth Analysis	✓✓✓	✓✓✓	✓✓✓	✓✓	✓	
Retirement Planning	✓✓✓	✓✓✓	✓✓✓	✓✓	✓✓	
Rollovers, Pension Plans, Annuities	✓✓✓	✓✓✓	✓✓✓	✓✓✓	✓✓	
Investment Implementation	✓✓✓	✓✓	✓✓	✓	✓✓✓	
Insurance Analysis (home, life, auto, etc.)	✓✓✓	✓✓	✓✓	✓	✓✓✓	
Goal Setting	✓✓✓	✓✓	✓	✓	✓	✓
Education Planning	✓✓✓	✓		✓✓		✓
Estate Planning	✓✓✓	✓✓	✓	✓✓		
Mortgage Review & Advice	✓✓✓	✓	✓		✓	
Employee Benefits Review	✓✓✓	✓✓				
Tax Projections & Planning	✓✓✓	✓				✓
Tax Preparation	✓✓✓					✓✓✓
Cash Flow Analysis	✓✓✓	✓	✓			
Unlimited Advice	✓✓✓					
Coaching: financial/life/business	✓✓✓					

Partnership Financial LLC - Flat Fee, no sales or commissions
Other Fee-only Planners - Fee based on percentage of investments managed
Fee-based Planners - Commission and/or fees based on assets managed
Stock Brokers - Commission and/or fees based on assets managed
Insurance Agents - Commissions - Commission
CPA, Tax Accountants - Fee-based or hourly rates + commissions if they sell products