

OVERVIEW SERVICE WHEEL AT A GLANCE

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INSTITUTIONAL CONSULTING



FIDUCIARY EDUCATION

Trustee Training
Callan College, Callan Institute
Actuarial Education
Education Policy Development



INVESTMENT POLICY DEVELOPMENT

Long Term Return Objectives
Risk Tolerance Assessment
Liquidity Analysis
Risk/Return Modeling



ASSET ALLOCATION

Capital Market Expectations
Monte Carlo Simulation
Portfolio Optimization
Diversified Portfolio Design



MANAGER SEARCH

Traditional and Alternative Managers
Qualitative/Quantitative Due Diligence
Contract and Fee Negotiation
Institutional Mutual Fund Access



PORTFOLIO IMPLEMENTATION

Comprehensive Portfolio Reporting
Back Office Support
Portfolio Rebalancing
Cash Flow Management



PERFORMANCE MONITORING

Capital Markets Review
Asset Allocation Tracking
Peer Group Review
Style/Benchmark Comparison



AFFILIATES & RESOURCES

Affiliates

Wipfli CPAs & Consultants

Resources

Callan Associates
Dimensional Fund Advisors (DFA)
Parametric Portfolio Associates



INDIVIDUAL WEALTH MANAGEMENT

Investment Advisory
Estate Planning
Risk Management
Tax Planning
Education Funding
Retirement Income Planning



RETIREMENT PLANS

Investment Advisory
Investment Policy Statement Development
Plan Administration & Compliance
Employee Education & Communication Design and Delivery
Plan Design
Plan Participation Analysis
Fiduciary Responsibility Assessment & Guidance
One-On-One Employee Retirement Feasibility Assessment
Comprehensive Retirement Plan Efficiency Analysis