

# 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