

Services Menu

Individual Services

Managed/Fee Based Accounts Institutional Shares

- IRA- Traditional and ROTH
- Brokerage Accounts
- Custodial Accounts
- Trust Accounts
- Estate Accounts

Insurance

- Life insurance- Term, Universal Life and Whole Life
- Long Term Disability insurance
- Long Term Care Insurance
- Annuity

Financial Consulting/Fee Only – Hourly or set fee for advisory services and ongoing financial assistance

Financial Planning* – A fee to create a financial Plan regarding Life and Disability Insurance Planning, Tax Planning and Management, Asset & Debt Management, Estate Planning, and an overall evaluation of goals and objectives to provide context for the financial plan in its entirety.

Business Services

Executive Planning

- Bonus plan
- Split Dollar
- Executive Compensation (Whole life, bonuses)
- Elective Deferred Compensation Plan
- Supplemental Executive Retirement Plan

Retirement Solutions

- 401K, 403B, 457 Individual 401(k), SIMPLE-IRA

Business Insurance

- Corporate Owned Life Insurance
- Long Term Disability Insurance buyout
- Life insurance buyout
- Business Overhead Insurance
- Cross Purchase Insurance
- Key Man Insurance
- Buyout Coverage
- Life Insurance
- Disability

*Scarlet Oak Financial Services does not offer legal or tax advice.



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