# Service 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, Solo 401(k), SEP IRA’s

**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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