



Your Other Options

What we typically observe in the marketplace

	NORTHSTAR CAPITAL ADVISORS	DO-IT- YOURSELF	ROBO ADVISOR	TRADITIONAL WEALTH MANAGEMENT FIRM	BANK ADVISOR	COMMISSION BASED "ADVISOR" (BROKER)
PORTFOLIO MANAGEMENT						
Low-Fee Investments	✓	✓	✓			
Customized Portfolio For Your Unique Situation	✓	✓		✓		✓
Tax-Efficient Management & Placement of Investments	✓		✓			
Strategic Tax Loss & Gain Harvesting	✓		✓	✓	✓	
Evidence-Based Rebalancing Techniques	✓		✓	✓	✓	
Tailored Investment Risk Analysis to Your Situation	✓					
Portfolio Structured to Maximize Stable Income in Retirement	✓					
401(k) Accounts Integrated In Overall Portfolio Asset Design	✓					
Sales Quotas and Proprietary Products					✓	✓
Equity Compensation Stock Option Analysis & Strategy	✓					
Behavior & Emotion Coaching Through Chaotic Environments	✓			✓	✓	
Consolidate & Simplify Your Investment Portfolio	✓			✓		
Outsourcing of Time Required to Manage Portfolio	✓		✓	✓	✓	✓
Fiduciary Oath & Standard of Care (100% of the time)	✓			✓		
Dedicated Private Client Relationship	✓			✓		✓
FINANCIAL PLANNING & TAX SERVICES						
Advice Built Specifically for Age 50+ Approaching or in Retirement	✓					
Proactive Guidance on All Financial Matters	✓			✓		
In-Depth Financial Projections (Retirement, Tax, Net Worth, etc.)	✓			✓		
Evidence-Based Retirement Income Maximization	✓					
Extensive Tax Planning & Strategy	✓					
Personal Tax Return Preparation & Analysis	✓					
Deep Integration Between Tax, Retirement Income & Investments	✓					
Retirement Health Insurance Optimization (Medicare, etc.)	✓					
Pension Analysis	✓			✓		
Social Security Optimization	✓			✓		
Outsourcing of Time Required for Financial Planning Decisions	✓			✓	✓	
Coordination with Other Professionals (CPA, Attorney, etc.)	✓			✓	✓	
Guidance on Charitable Giving Maximization Strategies	✓			✓	✓	

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