RA Bench

Creativity, competence, thoughtful analysis and superb service are the reasons clients come to us and stay with us. Since 1995, RA Bench has provided a tailored and comprehensive approach to designing, planning, and coordinating employee benefit plans, fringe benefit programs for senior executives, and wealth management strategies.

WEALTH MANAGEMENT THE PROCESS

ANALYZE CURRENT SITUATION

- Determine financial objectives and reasonable assumptions such as biases, concerns, family and business situation
- Inventory all current investments, assets and liabilities
- Analyze effectiveness of the manner in which assets are held—outright, partnership, LLC, trust
- Consider tax efficiency—income, estate & gift tax

DESIGN OPTIMAL PORTFOLIO

- Assess cash flow requirements
- Perform asset allocation analysis and model efficient portfolios
- Propose optimal allocation strategies for objective-driven results
- Prepare a written investment policy that contains investment objectives, investment guidelines and responsibilities

IMPLEMENT INVESTMENT POLICY

- Select investment managers and service providers
- Negotiate service requirements and fee arrangements
- Coordinate transfers and/or tax aware conversion process
- Serve as an unbiased liaison between client and service providers
- Implement a customized recordkeeping and reporting system

MONITOR AND REVIEW PERFORMANCE

- Provide ongoing supervision of investment program
- Prepare detailed quarterly investment performance reviews
- Prepare an annual review that summarizes performance and all transaction activity

Our comprehensive and flexible service array makes RA Bench an invaluable partner in successful long term wealth management.

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