



## ONE Plan

BondStreet Wealth Management and Bauer Evans are recognized leaders in investment, tax and estate advising. For more than two decades, we have managed complex wealth challenges by drawing on a breadth of sophisticated capabilities and maintaining a commitment to the highest fiduciary standards.

We are now offering an all-inclusive package where clients can get all of their needs met under ONE plan.

### **Administration**

Bill Paying – Signature Ready  
Budgeting & Cash Flow Comparisons  
Bank Reconciliations  
General Ledger Maintenance

### **Integrated Planning & Consulting**

Financial, Tax, Estate, Insurance Planning  
Trust Planning/Trust Liaison  
Real Estate Purchase & Sale Consultation

### **Financial Accounting/Reporting**

Annual Personal Financial Statements  
Performance Reporting  
Personal Financial Plan

### **Philanthropy**

Philanthropic Planning  
Charitable Foundation Planning

### **Investment Planning & Management**

Investment Allocation Strategy & Policy  
Portfolio Selection & Oversight  
Performance Analytics  
Equities, Fixed Income, Alternative Strategies

### **Income Tax Return Preparation**

U.S. Personal & State Tax Returns  
Charitable Trust Tax Returns  
Household Employee Payroll & Tax Forms

### **Legal Counsel** (Outsourced)

Preparation and/or Review of Wills, Living  
Trusts, Durable POA, Health Care Directives

### **Family Continuity**

Legacy Planning  
Mentoring Younger Generations on Fiscal  
Management & Responsibility

## ONE Fee

The BondStreet ONE team will work in the above areas based on client needs, for ONE fee. Our annual fee is based upon total personal assets, using a sliding scale (typically less than 1% annually – please inquire for specific pricing). Clients never have to worry about billing rates and hours spent. BondStreet's objective is to offer services and advice to give our clients the freedom to enjoy the important things in life.

Free yourself from the stress that comes with dealing with the financial issues of substantial wealth. The BondStreet ONE plan can help you get more of what money can't usually buy – time.

Please contact our office at (425) 212-3777 or [info@bondstreetwealth.com](mailto:info@bondstreetwealth.com) for more details.