



## ONE Plan Story

The following story is an illustration designed to show the benefits of BondStreet's ONE Plan. The couple used is fictitious, but based on very real examples of clients that we work on a regular basis. We hope this will show how we can help you or someone you know get what they want out of life instead of being mired in the unfortunate daily grind that comes with financial success.

John and Mary Strong are in their seventies and have three children and seven grandchildren. Along the way they have made some wise decisions and built a net worth of over 6 million dollars. They have a comfortable home in the city and nice vacation home in the islands. Their investments have become varied over the years, including partnerships, a small apartment building, a contract collection on three sold rental houses, two annuities, stocks and bonds in brokerage accounts, IRAs and a company pension. They have been diligently managing these investments, but lately it has turned into a burden, keeping them from fully enjoying the remaining quality years of their lives. They want to travel to warm destinations and explore new countries, give to their favorite charities and leave a Strong legacy so future generations will feel the positive impact of their lifetime of hard work. Also, John's family history suggests that Mary will outlive him and John has been handling most of the financial decisions for their 45 years of marriage.

The BondStreet ONE Plan allows John and Mary to hire one very qualified firm to handle the preparation of their will and/or living trust, do their trust planning, create a charitable giving plan while living or in legacy, prepare their tax returns, invest their stocks and bonds, pay their bills with signature ready checks already recorded for budgeting and tax purposes, reconcile all bank accounts, track and pay their quarterly estimated tax payments, fill out all requirements for household employees, monitor real estate and insurance billings and rates, prepare annual personal financial statements, consult on real estate matters and do their estate planning, all on an on-going basis.

The BondStreet ONE team does not charge extra for additional time spent in any of these areas. We assess an annual fee based upon net worth (less than 1% annually - please refer to our pricing schedule), so 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 the remaining years of their life. We have a staff of 15, including CPAs and Registered Investment Advisors, supported by systems, software, and processes to accommodate a variety of sophisticated needs on a timely basis.

In the past, services of this nature have only been available to "Ultra-High Net Worth" families with a net worth of \$20-50 million or more. We recognize that in today's world, there are many people who want and need this service who have a net worth much less than \$20 million. Our fee structure is actually much lower than what the Ultra-High Net Worth pay as a percentage of net worth because of our low overhead and efficient operation.

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. It's time to enjoy life. Please call our office at (425) 212-3777 for more details.