

Our Difference

	 Bull Oak	Typical Wealth Management Firm	DIY & Robo Advisors
Financial Planning			
Proactive Personalized Advice	✓	✓	✗
Net Worth Tracking	✓	✗	✗
Financial Health Monitoring	✓	✗	✗
Access to Leading-Edge Financial Tech	✓	✗	✗
Benefits Review	✓	✓	✗
Equity and Exec Comp Experts	✓	✗	✗
Independent Advice on Your Insurance Needs	✓	✓	✗
Outsourcing of Time & Stress	✓	✓	✓
Investment Management			
Diversified Portfolios	✓	✓	✓
Low-Cost Funds	✓	✗	✓
Evidence-Based Investing	✓	✗	✗
Tax-Efficient Withdrawal Strategy	✓	✗	✗
Strategic Tax-Loss Harvesting	✓	✓	✓
Behavioral Management Coaching	✓	✓	✗
Taxes & Estate Planning			
Tax Prep & Filing	✓	✗	✗
Estate Planning	✓	✗	✗
Annual Year-End Tax Planning	✓	✗	✗
Careful Consideration of Your Taxes & Portfolio	✓	✓	✗
Charitable Giving Advice	✓	✓	✗