What I Do At Bautista Planning and Analytics

Financial Planner Client

Goals:
Planner Clients are ready to clarify, simplify, and organize their financial life. They see the value in partnering with experienced Advisors to take a holistic approach to defining goals, analyzing options, making informed decisions, and implementing strategies to achieve their financial goals.

Planner Clients want to address their questions, reduce financial worries, and decrease complexity so that they can focus on what matters most in life.

Planner Clients partner with us on an ongoing basis to stay informed, access expertise, and make adjustments as changes in finances, laws, and life occur.

Services:
Planner Clients design and implement an integrated financial plan on a tri-annual basis covering selected aspects of their financial life, which can include:
- Building, Protecting and Distributing Wealth
- Portfolio Construction
- Asset Allocation
- Estate Planning
- Tax Planning
- Life Insurance
- College Funding
- Retirement Planning
- Executive Compensation

Planner Clients partner with us, initially and over time, to manage and maintain their financial plan through ongoing communication and collaboration that reflects changes in their life, planning strategies, the laws and the investment markets.

Fees:
Comprehensive financial planning is paid on a monthly basis that covers a customized review of your financial situation, goals, and needs, and provides specific recommendations.

The first month is about building and presenting the financial plan and upfront fees range from $750-$5000.

The sequential months are about implementing the recommendations from the financial plan with 3 strategic meetings a year. The fees range from $150-$300/mo.

Investor Client

Goals:
Investor Clients seek professional knowledge, expertise and support to align their investment strategy with their financial goals.

Investor clients see the value in partnering with experienced Advisors to design, implement and manage an investment strategy, including investment research, analysis, and selection.

Investment Clients view professional management as a way to accomplish investment objectives while freeing up valued personal time.

Services:
Investor Clients design and implement an investment strategy appropriate to their situation, risk tolerance and goals.

Investor clients receive ongoing investment management guidance and service, which can include:
- Investment goals
- Risk tolerance
- Investment strategy
- Investment research
- Investment analysis

Clients experience support and communication as it relates to investment management.

Important to this process is a qualitative discussion regarding client risk parameters. We follow a regular cycle to implement and monitor client.

Fees:
Minimum investable assets: $25,000

Investment Management Advisor fees (annual) range from 0.95% to 1.00% varying with platform and investment structure. See Investment Fee schedule for details. Financial planning services are not included, however certain engagements may include targeted financial advice.

Business Consulting and Analytics

Goals:
Business Consulting and Analytic Clients are ready to use descriptive, predictive, and prescriptive analytics to help them make better decisions with their business and discover any gaps within their operations. They see the value in partnering with experienced Analyst to take a investigative approach to defining goals, analyzing operations, making informed decisions, and implementing strategies to achieve their business goals.

Business Analytic Clients want to address their questions, reduce business worries, and decrease uncertainty so that they can get better results with less effort.

Business Analytic Clients partner with us on an ongoing or project basis to stay informed, access expertise, and make adjustments as changes in the business occur.

Services:

Business Consulting and Analytic Clients is administered on a project or hourly basis covering selected aspect of their business, which can include:
- Goal Setting
- Strategic Management
- Operational Management
- Data Visualization
- Google Analytics
- Demand Modeling and Price Optimization
- Statistics and Sensitivity Analysis
- Data Structuring
- Fraud Detection

Business Consulting and Analytic Clients partner with us, initially and over time, to be their strategic partner and collaborate on changes in their business operations.

Fees:
The Business Analytics rates is paid on a project basis and the minimum fee is $10,000 per project.

An ongoing retainer fee for quick access to advice is $500/mo.

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PLANNING AND ANALYTICS