Services and Tools We Offer Clients: An Overview

In addition to financial planning and focusing on investments and building wealth, The Millstone Evans Group is pleased to offer our clients a variety of important, valuable services and tools that play a key role in the overall service that our team provides.

Some are technology tools we use on your behalf and/or share with you. Most, however, are services you can use directly and are *complimentary* to our clients (a couple are offered at a discount/small fee). We can help clients easily sign up and manage all of the services and tools that are available for your direct use. Click on the links below to learn more about each of them. There's a **C for Complimentary** next to the services and tools we offer complimentary.

Financial Planning Tools

(Main Internal Points of Contact: Sacha, Greg, Brad, Martial)

- Financial DNA®. The platform delivers client behavioral insights that address risk, spending, goals, communication, work and life interactions. Financial DNA allows advisors to really understand their client beyond typical risk tolerance profiles. **C**
- My Big Picture. This online portal works in two ways. For us, it *helps us help you* with financial and cash flow planning. For clients, it safely and securely maintains investments, budgets, expenses and other important financial accounts – from credit cards to mortgages (whether held through us or not) - in one location. **C**
- YCharts. Web-based financial research and analysis platform for asset managers and advisors that helps with building custom portfolios and generating analyses. **C**

Estate Planning
(Main Internal Points of Contact: Sacha, Greg, Brad, Toni)

We use Estate Guru which allows financial advisors to help provide clients with an affordable and comprehensive estate plan using state of the art software and a network of estate planning attorneys.

ESG Investment Planning.
(Main Internal Points of Contact: Sacha, Brad)

YourStake is a tool that uses trusted public sources to gather data and evaluate companies based on important values and offer smart ESG investing options with expected returns that are equal or better to what you currently have.

Education Planning and Funding
(Main Internal Points of Contact: Sacha, Martial)

College Aid Pro™. A powerful college planning tool that simplifies financial aid, helps families maximize scholarships and grants, and guides students toward the most affordable schools—so they can graduate with less debt and more financial freedom.

Longevity Planning
(Main Internal Point of Contact: Toni)

We use the following services and tools for our longevity planning:

- Clear Match Medicare. An unbiased agent partners with you to navigate options.
- EverSafe. This alert shields you and your loved ones from financial fraud.
- Everplans. A secure service that helps you organize and share key documents.
- Broadspire Care Management. Fee-based caregiving support tailored to your needs.