LARSON

CHARLES SCHWAB / LARSON

SCHWAB ADVISOR NETWORK & THE BENEFITS OF WORKING WITH LARSON

Larson has custodied billions at Schwab/TD Ameritrade for many years. In 2020, Larson joined the referral network now known as the Schwab Advisor Network (SAN). It is evident there are few firms on the platform that do in-house, holistic financial planning and implementation.

Referrals from Schwab Financial Consultants have access to Larson's comprehensive network of services, including tax planning, wealth management, estate planning, and more. Additionally, our alternative investment division has over 25 products approved on the Schwab platform. These have proved to be value-add opportunities for clients seeing to expand and diversify beyond their retail accounts.

LARSON in-house services

- Portfolio management
- Cash flow analysis
- Risk management strategy
- Investment analysis & strategy
- Retirement & education funding
- Benefits planning
- Estate planning
- Tax strategy
- Student loan advisory
- Private equity
- Commercial real estate company
- Insurance agency

	Traditional Client	SAN Client
Annual Financial Planning Fee	$2,500	$0
Tax Return	$500-$2,500	Free (>$3M AUM Client)
Investment Management	.7-1.25%	.3-1%
Services		
Tax Planning	✗	✓
Discussion w/ Estate Attorney	✗	✓
Investment Management	✓	✓
Retirement Planning	✓	✓
Alternative Investments	✓	✓