



FINANCIAL PLANNING AND INVESTMENT MANAGEMENT

What we do for our clients

PROCESS,
NOT A PRODUCT.

01 Investment planning	02 Retirement planning	03 Risk management	04 Cash flow and budget	05 Assistance to loved ones	06 Estate planning and giving	07 Income tax planning
Review of portfolio	Retirement goal setting	Review of existing policies	Income sources	Gifts	Wills	Review of cost basis
Risk profiling	Social Security and Medicare	Life insurance needs	Expenses and budgeting	Education planning	Power of attorney	Review of realized gains
Asset allocation	Business planning	Long-term care insurance	Debt management	Caring for the elderly	Living wills	Carry-forward losses
Withdrawal strategies	IRA contributions and conversions	Liability coverage	One-time expenses	529 college savings plans	Health care proxy	Tax-loss harvesting
Investment policy statement	Employer-sponsored plans		Planned large expenses	Roth IRAs for children	Trusts	Deductions and credits
Stock concentration	Annuities and pensions		Emergency funding	UGMA/UTMA accounts	Estate taxes	Potential Roth conversions
Review of investments held outside the firm	RMDs and withdrawal strategies		Dollar-cost averaging		Charitable giving and trusts	Health savings accounts
	Self-employed retirement plans		Lines of credit			

How we work with you

We coordinate with your other advisors, such as your attorneys and accountants.

We hold regular meetings and make sure all planning is well coordinated and implemented.

We maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.

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