FINANCIAL PLAN TYPES & ADDITIONAL SERVICES

A financial plan can help you answer important questions:

- When can I retire and how much income do I need?
- Will I be able to leave a legacy, and are my loved ones properly protected?
- Are my investments positioned to withstand inflation and taxes?

We provide two versions of our plans: **Basic** and **Comprehensive**

Basic Financial Plan

A snapshot of where you are at the time of the plan, it includes:

- Net Worth Statement
- Asset Allocation Review
  (comparing where you are to where you should be)
- Personalized Savings Strategies
- Basic Estate Planning and Beneficiary Review

Comprehensive Financial Plan

In-depth plan including all "Basic" features, plus:

- Cash Flow Analysis
- Social Security Planning / Strategies
- Income Distribution Planning
- Mortgage and Debt Review / Strategies
- Estate / Trust Planning
- Tax Planning and Strategies
- Monte Carlo Success Probability
- Planning for various scenarios and "what if" situations
- Annual updates to track your progress and to adjust for changes in your life as well as tax law updates

Financial Planning Services

Services	
Basic Financial Plan (a snapshot of where you are at, at this time)	✓
Comprehensive Financial Plan	✓
Comp Negotiations/Benefit Review	✓
Tax Efficient - Retirement Income Distribution Analysis	✓
Roth Conversion Analysis	✓
RSU/Stock Option Planning	✓
Advice/Analysis on Assets Held at Another Institution	✓
Cost Basis Analysis	✓
Detailed Survivor Income Needs	✓
Debt Management/Elimination Strategies	✓
Fee Only Financial Check-up (Meeting & Follow up)	✓
Concentrated Stock Strategies	✓

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