

MENU OF SERVICES

As a Fiduciary, we provide Financial/Retirement Planning, Investment Strategies, and Insurance Services.

Financial/Retirement Planning

- Retirement Projections/Analysis
- Savings Options
- Smart Tax Planning
- Social Security Optimization
- Pension Maximization
- Tax-Efficient Withdrawals for Income
- Cash Flow/Budgeting
- Debt Management/Payoff
- College Savings/Loans
- Options for 401(k) or Retirement Savings
- Understanding Investment Risk
- Health Insurance/Long-Term Care Needs
- Maneuvering Through 3 Stages of Retirement
- Navigating Life/Health Changes
- Wills, Trusts, and Gifting

Investment Strategies

- Investment Management Services (Stocks, Bonds, ETF's, Mutual Funds, and Specialized Investments)
- One Time Employer Plan Reallocation (401(k), 403(b), 457, ESOP, Deferred Comp)
- One Time Outside Investment Account Reallocation/529 Plan Analysis/Reallocation
- Employer Retirement Plans (401(k), Simple IRA, Cash Balance, Pension)
- Buckets of Money (Where and how much you should be saving)

Insurance Services

- Life/Disability/Long-Term Care Policy Review
- Life/Disability/Long-Term Care Quotes
- Review of Current/Proposed Annuities
- Fixed/Indexed/Variable Annuity Quotes

Add-On Services

- Death Claim/Beneficiary Assistance
- Selecting Employee Benefits
- Client Education Events
- Second Opinion Services
- Retirement Workshops
- 10 Steps to Financial Freedom Consultation



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