MENU OF SERVICES

Retirement Planning
- ☐ Saving for retirement
- ☐ Income in retirement
- ☐ Tracking Progress
- ☐ 401(k) /403(b) Reviews

Estate Planning Strategies
- ☐ Proper Titling
- ☐ Using Wills/Trusts
- ☐ Succession Planning
- ☐ Legacy Planning
- ☐ Charitable Giving

Insurance Issues
- ☐ Life Insurance
- ☐ Disability Insurance
- ☐ Long-Term Care Insurance

Professional Associations
- ☐ Attorneys
- ☐ CPA's
- ☐ Insurance Agents
- ☐ Investment Banking
- ☐ Personal/Business Banking
- ☐ Real Estate Agents
- ☐ Payroll Services

Investment Issues

Financial Planning and advice including goal setting, risk tolerance, portfolio review and economic outlook.

- ☐ Commentary and Research
- ☐ Product Placement/Review
- ☐ Stocks
- ☐ Bonds
- ☐ CD's/Money Markets
- ☐ Annuities
- ☐ Mutual Funds
- ☐ Real Estate Investment Trusts
- ☐ Business Development Companies

Business Issues
- ☐ Retirement Plan Analysis
- ☐ Employee Education
- ☐ Investment Policy Statement

Life Issues
- ☐ Planning Funding For a child's Education
- ☐ Aging Parents
- ☐ Family Members with Special Needs

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