FINANCIAL CONFIDENCE FACTORS

RISK ANALYSIS

- Insurance Assessments
  - Health
  - Life
  - Disability
  - Long-term Care
  - Homeowner's

INVESTMENT MANAGEMENT

- Asset Allocation (Equity, Fixed Income, Foreign & Alternatives)
- Platform Selections (Stocks & Bonds, Mutual Funds, ETF's, REIT's, MLP's)
- Ongoing Management and Due Diligence
- Monthly Performance Reporting

NET WORTH & CASH FLOW ANALYSIS

LEGACY AND ESTATE PLANNING

- Wills, Trusts & Powers of Attorney
- Advanced Directives (End of Life)
- Proper Ownership & Titling
- Minimize Fees, Costs & Taxes

TAX PLANNING & STRUCTURING

- Structuring Tax Transactions
- Proactive Tax Strategies
- Annual Planning & Structuring
- Maximize Tax Deferral Techniques

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