HELPING YOU GET YOUR FINANCIAL HOUSE IN ORDER

	BUDGETING & SAVING	PERSONAL RESERVES MANAGEMENT	RETIREMENT INCOME PLANNING	ASSET / INCOME PROTECTION	MAJOR PURCHASE PLANNING	WEALTH TRANSFER PLANNING
SERVICES PROVIDED	Family Budget Savings Allocation Analysis Debt Analysis Income Analysis **TAXATION**	Current Savings Analysis Investment Analysis Liquidity Features **TAXATION**	Current Retirement Plan Analysis Investment Analysis Allocation Analysis Retirement Budget Income Projection Income Protection **TAXATION**	Current Insurance Analysis Risk Exposure Assessment Insurance Needs Analysis Cost Analysis **TAXATION**	College Savings Home Purchase 2nd Home Purchase Auto Purchase **TAXATION**	Legal Document Review Beneficiary Review Trust Planning Insurance Usage **TAXATION**
BENEFIT	**More Savings** **Less / No Debt**	**Prepared to Handle the Financial Emergencies in Life**	**Maximizing Income Available in Retirement**	**Financial Protection from a Disastrous Life Event**	**Realizing Special Dreams**	**Preserving Assets for Spouse and Loved Ones**