



HELPING YOU GET YOUR FINANCIAL HOUSE IN ORDER

SERVICES PROVIDED	BUDGETING & SAVING Family Budget Savings Allocation Analysis Debt Analysis Income Analysis TAXATION	PERSONAL RESERVES MANAGEMENT Current Savings Analysis Investment Analysis Liquidity Features TAXATION	RETIREMENT INCOME PLANNING Current Retirement Plan Analysis Investment Analysis Allocation Analysis Retirement Budget Income Projection Income Protection TAXATION	ASSET / INCOME PROTECTION Current Insurance Analysis Risk Exposure Assessment Insurance Needs Analysis Cost Analysis TAXATION	MAJOR PURCHASE PLANNING College Savings Home Purchase 2 nd Home Purchase Auto Purchase TAXATION	WEALTH TRANSFER PLANNING Legal Document Review Beneficiary Review Trust Planning Insurance Usage TAXATION
	BENEFIT	More Savings <hr/> 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

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