

## **FINANCIAL PLANNING SERVICES**

### **Financial Statements**

- Cash Flow and Net Worth Statement
- Budgeting

### **Goal Setting**

### **Portfolio Investment Analysis**

- Review of current portfolio asset allocation
- Proposed portfolio asset allocation

### **Retirement Analysis**

- Needs analysis
- Portfolio investments and other asset projections
- RMD Analysis
- Monte Carlo Analysis
- 401(k) Asset Allocation
- IRA/Roth IRA Analysis
- SIMPLE/SEP/Keogh (*for self-employed*) Analysis

### **Insurance Analysis**

- Life Insurance Analysis
- Disability Analysis
- Health Analysis
- Home and Auto Analysis
- Long-Term Care Analysis

### **Estate Planning**

- Wills
- Trusts
- Healthcare Proxy
- Power of Attorney

### **Eldercare/Medicaid Planning**

### **Education Funding Analysis**

