CORRADO
FINANCIAL
GROUP

CFG CPA, LLP

48 S. Franklin Turnpike #300
Ramsey, NJ 07446
T 201 661 6600
F 201 661 6601

corradofinancialgroup.com

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

*** Through our network of professionals*