

**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*

