

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 _____

Income Tax:

- Tax Preparation _____
- Tax Planning _____

Estate Planning:

- Wills _____
- Trusts _____
- Healthcare Proxy _____
- POA _____

Eldercare/Medicaid Planning:

Education Funding Analysis:

Other: _____
