

The Five Key Areas of Financial Planning

Compare the services you are receiving today

Your Current Firm	SFA	Estate & Family Wealth Planning
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of your current estate plan and concerns
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assistance in transferring assets to your Living Trust or other trusts
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of beneficiary designations and asset titling
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of your long-term care needs

Asset & Risk Management

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of Property & Casualty coverage and limits
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of exposure to catastrophic events such as disability
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of your long-term care needs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of need for Funeral Trust, preplanning burial or cremation

Tax Reduction Planning

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of your tax return to highlight opportunities to help maximize tax reduction strategies
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations of tax solutions including tax-advantaged investments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Staying up-to-date on and presenting new tax laws that can affect your situation

Retirement Income & Distribution Planning

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of your current and future income needs in light of taxes, inflation and other issues
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Development and implementation of recommendations to help fund your income needs and help maintain a comfortable standard of living
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations regarding the distribution strategy for your employer retirement plans & IRAs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA, carefully coordinated with your Estate Plan

Investment Management

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reviewing your investments and designing a personalized portfolio appropriate to your needs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Regular monitoring of your investments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly, semi-annual or annual meetings to: review and evaluate your investment results, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly Statements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Independent Financial Advice