

Typical Financial Planning Objectives

Retirement Planning

- Retirement Projections
- Distribution Strategies
- Income Planning
- Employee benefit planning
- Retirement plan analysis

Investment Planning

- Develop Asset Allocation
- Investment Strategies
- Reallocation strategies
- Economic updates
- Risk assessment questionnaire

Cash Flow Planning

- Budget analysis
- Cash flow projections
- College Funding Planning
- Goal funding strategies
- Debt consolidation strategies
- Major purchase analysis

Risk Management

- Catastrophic illness planning
- Coverage assessment
- Recommendations for gaps in coverage
- Life insurance review
- Long-term care planning

Estate Planning

- Coordination with attorney
- Review account registrations
- Review beneficiary designations
- Wealth transfer and gifting strategies

Philanthropic Planning

- Charitable gifting strategies
- Coordination of estate plan with charities
- Beneficiary options
- Create and implement strategies for family wealth transfer

