

Midwest Money Management Inc.

Wealth Management Organizer

Goal Planning

- Retirement
- Education
- Vacation
- 2nd Residence
- Legacy
- Other

Assets

- Property
 - Real property
 - Disposition strategy
 - Personal property
 - Disposition strategy
- Investments
 - Risk profile
 - Allocation strategy
 - Tax strategy
 - Contribution / Withdrawal rate
- Business
 - Structure
 - Tax efficiency
 - Liability management
 - Succession plan

Liabilities

- Debt structure review
- Debt reduction plan

Cash flow

- Income planning
 - Employment
 - Self-employment
 - Pension
 - Social Security
 - Investment
- Spending
 - Non-discretionary
 - Discretionary

Protection

- Insurance
 - Medical
 - HSA
 - Flex spending
 - Disability
 - Property & Casualty
 - Liability
 - Long term care
 - Life
- Durable Power of Attorney
- Health care directive

Estate Distribution

- Will
 - Executor notification
- Trust
 - Trustee notification
- Asset titling
- Beneficiary designations
- Gifting
 - Charitable
 - Non-charitable

Securities offered through Parkland Securities, LLC., Member FINRA and SIPC

Fee-based investment advisory services offered through Sigma Planning Corporation, a registered investment advisor.

Midwest Money Management Inc. is independent of Parkland Securities, LLC and Sigma Planning Corporation.

17316 Kenyon Ave #104, Lakeville, MN 55044