Financial planning can require a significant amount of time,

energy and resources to manage. The risk of failing to plan

can be significant. Innovative Financial Group can provide the opportunity to outsource some, or all, of the responsibility.

Learn more about how our services may benefit you by

contacting us today for a complimentary consultation.

**Comprehensive Financial Plan**

Work in partnership with our team to develop

your personalized comprehensive plan.

* Main topics include: Retirement Planning and Distribution Strategies, Education, Estate Planning, Tax Strategies, Life Insurance and Long Term Care Planning
* Special Needs Planning
* Ongoing maintenance and reviews to evaluate your progress toward goal
* Access to online portal

*Plans start at $4,500.00*

**Financial Plan Foundation**

Work with us to build your financial foundation.

* Pre-Marital Financial Planning
* Starting Your Career
* Creating a Budget
* Debt Management: Student Loans / Credit / Mortgage

*Plans start at $1,500.00*

**Targeted Planning Strategies**

Collaborate with our team to either focus on the areas

that are the most important to you or build your own plan.

* Social Security Analysis
* Spending / Budgeting and Strategic Money Management
* Family Money Dynamics and/or Family Support Issues
* Startup, Acquiring, and Transitioning your Businesses
* Employee Stock Options / Executive Benefits
* Multi-Generational Estate Planning
* Post-Divorce Financial Planning
* Charitable Giving Strategies
* Education Planning

**Investment Advisory**

* Discussions will include your investment objective, current financial situation, risk tolerance, tax profile and liquidity needs to develop a recommendation for the profile to suit your goals that is in your best interest.
* Advisory services can be retained for assets not to be held directly

**Insurance Advisory**

* Discussions will include your current financial situation to determine all areas exposed to financial risk.
* Evaluations to include multiple lines of coverage, to include:

Life, Disability Income, Long Term Care

*Services start at $500.00*