Working with BFG Financial Advisors

Comprehensive Financial Planning

- **GOAL SETTING**: Help clarify financial and life objectives
- **CONTINGENCY PLANNING**: Implement risk management and insurance solutions
- **INCOME MAINTENANCE**: Manage cash flow and debt
- **RETIREMENT**: Design lifetime income strategies
- **GROWTH**: Develop investment strategies and portfolio allocations
- **TAX MANAGEMENT**: Provide tax awareness and recommendations
- **ESTATE PLANNING**: Build plans for preservation and distribution of wealth
- **EDUCATION FUNDING**: Prepare for college and beyond

Wealth Management Plan Coordination

- **LEGAL AND TAX ADVISORS**: Collaborate with attorneys and accountants for efficient and effective outcomes
- **ANCILLARY PROFESSIONALS**: Integrate your financial plan working with mortgage, real estate, insurance, banking, and other professionals
- **BUSINESS AND PERSONAL PLANNING**: Synchronize personal and business advice for closely-held business owners; assist with succession plan implementation

Multigenerational Planning

- **LEGACY PLANNING**: Preserve your legacy for generations
- **COMMUNICATING**: Facilitate conversations with children and grandchildren
- **CONTINUITY**: Identify shared responsibilities and opportunities with future generations
- **PHILANTHROPY**: Assist with family foundations and charitable giving

Sounding Board and Anchor

- **STABILITY**: Provide reassurance and calm during difficult economic times
- **EVALUATION OF OPPORTUNITIES**: Discuss ideas and implications when opportunity knocks
- **TEMPERED ADVICE**: Help minimize emotional responses to market conditions
- **NAVIGATING CHALLENGES**: Adjust for unforeseen circumstances when they arise

Ongoing Client Reviews

- **PLANNING MODEL**: Prepare an up-to-date snapshot of your financial plan
- **MEASURING PROGRESS**: Confirm your goals and recalibrate to reflect your current situation
- **PORTFOLIO EVALUATION**: Monitor and rebalance investments, as needed
- **FAMILY CONDITIONS**: Make any necessary adjustments based on personal, business, and family circumstances

Service and Communication

- **STRATEGIC MEETING**: Update the state of your finances
- **TACTICAL PLANNING CALL**: Offer timely reminders and adjustments
- **STAFF ACCESS**: Ensure CFP® Practitioners and staff are available for ad hoc meetings, as needed
- **ONLINE ACCESS**: Provide 24/7 access to your portfolio dashboard and performance reporting
- **E-NEWS**: Communicate regular market and firm updates

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