The Five Key Areas of Financial Planning

Compare the services you are receiving today

Your Firm	DFC	
		Investment “Watch Dog” Service
☐	☑	Reviewing your investments and designing a personalized portfolio appropriate to your needs
☐	☑	Continual monitoring of your investments
☐	☑	Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your portfolio
☐	☑	Monthly/Quarterly Statements
☐	☑	Independent Advice
☐	☑	Recommendations regarding allocations within your employer provided retirement plans such as 401(k)s
☐	☑	Aggregation of all your accounts to simplify and reduce paperwork
		Estate and Family Wealth Planning
☐	☑	Analysis of your current estate plan and concerns by our in-house team of estate planning and elder law attorneys
☐	☑	Complimentary consultation with our in-house estate planning and elder law attorneys or with your attorneys
☐	☑	Assistance in transferring assets to your Living Trust or other trusts
☐	☑	Long-term care asset protection planning and Medicaid qualification expertise
☐	☑	Estate and trust administration services in the event of the death of a loved one
		Tax Reduction Planning
☐	☑	Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies
☐	☑	Periodic review of your tax situation and planning to incorporate any new tax law changes
☐	☑	Complimentary consultation with your tax preparer
☐	☑	Recommendations of tax solutions including tax advantaged investments
☐	☑	Staying up-to-date on and presenting new tax laws that can affect your situation
		Retirement Income & Distribution Planning
☐	☑	Analysis of your income needs now and in the future, in light of taxes, inflation and other issues
☐	☑	Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
☐	☑	Recommendations regarding the most appropriate distribution strategy for your employer retirement plans & IRAs
☐	☑	Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA, carefully coordinating with your estate plan
☐	☑	Review the possibilities and timing of converting to a Roth IRA
		Client Services & Communications
☐	☑	Quarterly Newsletter to keep you apprised of the most current planning options
☐	☑	Quarterly, semi-annual or annual reviews
☐	☑	Special reports on how to help reduce your taxes and other important topics
☐	☑	Special Gold Medal Service Events (including client education and appreciation events)

Davidov Financial Coaching, LLC
1981 Marcus Avenue, Suite 231, New Hyde Park, NY 11042
516.587.5550 www.davidovfinancial.com