

List of Services

Financial Planning	Cash Flow & Budgeting	Retirement Planning	Retirement Income Planning	Risk Management & Insurance	Family Services	Social Security Planning
Goal Setting	Cash Flow Analysis	Retirement Goal Setting	Review of Income Sources	Review of Existing Policies	College Savings Planning	Social Security Analysis
Needs Analysis	Expenses & Budgeting	Needs Analysis	401(k) Management	Life Insurance Needs	529 College Savings Plans	Disability
Cash Flow and Budgeting	Debt Management	Retirement Plan Creation	Portfolio Review & Analysis	Long Term Care Insurance	Roth IRAs for Children	Spouse & Survivor Benefits
Investment Management	Planned Purchases	Estate Planning & Philanthropy	Inheritance Planning	Disability Insurance	Gifts	Couple Coordination
Retirement Planning	Emergency Savings	Debt Management	Cash Flow Projections	Health Insurance	Elderly Planning	Special Needs Coordination
Risk Management & Insurance	Mortgage Review	Legacy Planning	Real Estate Investments	Homeowner's & Renters Insurance	Legacy Planning	Filing Strategies
Legacy Planning	Lines of Credit	Health Care Management	Reverse Mortgages	Liability Coverage	Divorce & Widowhood Services	Medicare Planning

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Disclosures:

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