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# PROFILE OF PRODUCTS & SERVICES



Regardless of your stage in life, your income or your goals, a financial plan can help you get where you want to go. A well-thought out plan takes into account short-and long-term goals such as retirement, education savings, asset allocation, diversification and risk management. Then, your wealth advisor will recommend products and services to support the plan. Contact your wealth advisor today to discuss the products and services that may be appropriate for you. If you have additional questions on a product or service that is not on this list, please reach out. We are more than happy to answer them for you.

## INDIVIDUAL RETIREMENT ACCOUNTS AND BUSINESS RETIREMENT PLANS

- Traditional and Roth IRA
- IRA Rollover
- 401(k)
- 457
- 403(b)/TSA
- Owner-only 401(k)
- Profit Sharing
- Payroll Deduction IRA
- SIMPLE IRA
- SEP (Simplified Employee Pension)
- Defined Benefit

## GIFTING OR GIVING STRATEGIES

- Trusts
- Donor Advised Funds

## EDUCATION FUNDING

- 529 College Savings Plans
- Coverdell Education Accounts
- UGMA/UTMA

## FINANCIAL PLANNING

- Net Worth & Cash Flow
- Retirement
- Survivor Income Needs
- Asset Allocations
- Taxes
- Education
- Insurance (Disability, Long-Term Care, Life)
- Estate
- Business Continuity
- Saving and Investing for Other Goals (Home Purchase, Vacation, Wedding, etc.)

## INSURANCE

- Annuities
- Life Insurance
- Long-Term Care, Disability
- Individual, Business and Group Products

## INVESTMENTS

- Mutual Funds
- Stocks
- Exchange Traded Funds (ETFs)
- Unit Investment Trusts (UITs)
- Options
- Municipal Bonds
- Corporate Bonds
- U.S. Government Securities
- Mortgage Backed Securities
- Brokered CDs
- Structured Notes

## FEE-BASED ASSET ALLOCATION PROGRAMS

- Managed Allocation Portfolios
- Separately Managed Accounts and Unified Managed Accounts

[www.prinvestadvisors.com](http://www.prinvestadvisors.com)

*Securities & advisory services offered through LPL Financial, Member FINRA/SIPC, a registered investment advisor.*

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