

HOW COMPREHENSIVE IS YOUR FINANCIAL PLAN?

LIVING AND GIVING				RETIREMENT AND LEGACY			HIGHLY SPECIALIZED			
Cash Flow and Expense Planning	Insurance Planning	Investment Planning	Education Planning	Tax Planning	Retirement Planning	Estate Planning	Retirement Income Planning	Family Needs Planning	Philanthropic Planning	Generational Wealth
Develop net worth statement	Review insurance policies	Access risk tolerance	Establishing tax efficient savings plans	Ensure tax efficiency in asset location	Review retirement savings strategy	Review will and/or trust	Retirement distribution Strategy	Divorce planning	Develop family mission and values	Conduct family goals meeting
Examine current savings & expenses	Access coverage adequacy for life, long term care disability	Analyze current portfolio	Assessing affordability and funding options	Discuss harvest tax losses	Develop retirement vision and goals	Organize estate documents	Retirement income planning	Eldercare/ long-term care planning	Create impact goals and priorities	Review transitional strategies
Identify short & long term savings goals	Develop strategies to mitigate risks	Translate savings goals to investment objectives	Maximizing tax-free gifts	Advise tax aware strategies	Review corporate benefits	Ensure appropriate control parties- financial & health		Planning for a solo journey		
Establish emergency fund		Create asset allocation strategy	Helping children save and budget	Keep up to date on tax law changes	Claiming strategy for social security	Ensure proper asset titling		Planning for special needs children		
Create optimal savings strategy		Construct tax efficient portfolios								
Analyze liabilities for savings opportunities		Regularly review investment performance								

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