



FLANAGAN FINANCIAL SERVICES
THE FUTURE IS YOURS

FLANAGAN FINANCIAL SERVICES
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Flanagan Financial Services Unique Competencies

- Time & Purpose Financial Strategy Discussions
- Comprehensive Estate & Legacy Planning Dialogues
- Pre-Cana Financial Consultations
- Memory Money Investing
- Second Opinion Analyses
- Tax-Smart Investing & Distribution Methodologies
- Next Generation Financial Preparations
- “Not what you make, but what you keep” – Approaches
- Retirement Strategies including
 - Social Security Claiming Considerations
 - Defined Benefit Pension Plan Optimization Approaches
 - In-Service 401(k), 403(b), TSP as well as other employer sponsored retirement plans – Can you afford another 2008 loss of 50% of your portfolio value? Just as you are ready to retire?
 - Preserving your retirement income
 - Utilizing investment options that could help you achieve your retirement income objectives
 - Determining “When, How, How Much & Can I” Prognoses
 - Medicare – What you don’t know could cost you!
 - Required Minimum Distribution Optimization Opportunities
 - Developing and Implementing a successful Long-Term Care Family Plan
- Development and Implementation of Short, Medium & Long-Term Financial Strategies designed around your specific family situation
- Develop & Implement Business Continuation Programs
- Charitable Foundations and other ways of – Creating a lasting memory for a loved one
- Personal written financial strategies that can potentially lead to a more relaxed, confident, successful life-long journey before - during and after retirement

If you or someone you know could benefit from these services, please have them give us a call at 630-235-5273 or email mflanagan@flanaganfinancialservices.net

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