

IS YOUR PLAN A *PERFECT 10*?

Ask Your CPA Today!



Method 10TM

Comprehensive Financial Solutions

ASK_{YOUR}TM
CPA.

 1st GlobalSM
RESEARCH & CONSULTING

Method 10™: The 10 key wealthcare issues that you and your financial advisor systematically address in order to implement comprehensive financial solutions.

INVESTMENT PLANNING

- 1 Integrated Asset Allocation and Portfolio Design
Customized Asset Management Programs
Diversification Strategies
Alternative Investments

TAX PLANNING

- 2 Income Tax and Estate Tax Planning
Tax-Advantaged Investing
Charitable Planning
Trust Services

INCOME PROTECTION AND ASSET PRESERVATION

- 3 Long-Term Care Insurance
Disability Protection
Income Replacement
Creditor Protection

RETIREMENT PLANNING

- 4 IRA Rollover and Distribution Planning
Income Projection Analysis
Fixed Income Strategies
Qualified Plan Design and Compliance

BUSINESS PLANNING

- 5 Business Succession
Buy-Sell Agreements
Non-Qualified Retirement Plans
Key Employee Retention

ESTATE PLANNING

- 6 Wealth Transfer and Tax Reduction
Charitable Gifting
Trust Services

INSURANCE

- 7 Life Insurance Analysis and Design
Long-Term Care Insurance
Disability Protection

EDUCATION PLANNING

- 8 Coverdell Education Savings Accounts
529 College Savings Plans
UGMA/UTMA Accounts
Trust Services

SPECIAL SITUATIONS

- 9 Divorce
Incapacitation and Control of Assets

DEBT MANAGEMENT

- 10 Creditor Protection
Efficient Credit Management

Method 10™

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