Annual 4 Theme Advocacy Commitment

"We earn our relationship, not by just creating the plan, but by actively managing it. Consistent and disciplined actions help us move you toward your desired lifestyle."

EDUCATE. COLLABORATE. NAVIGATE.

Wealth Builder Blueprint™ Review

- FinLife Management Updates
- Priority Action List Progress
- Financial Objectives & Goals
- Previous Projections
- Balance Sheet
- Social Security Analysis

Protection & Estate Solution™ Review

- Insurance & Estate Priority Action List Items
- Existing Insurance Analysis
- Updates to P&C and Individual Coverages
- Legal Documents
- Medical and Medicare Insurance Review

Tax Efficiency Formula™ Review

- Wealth Advisor & CPA Collaboration
- Coordinated Year-End Tax Planning
- Realized & Unrealized Gain/(Loss) Review
- Tax Loss Harvesting
- Maximization of After Tax Returns
- Required Minimum Distribution Planning

Investment & Portfolio Optimization™ Review

- Investment ViewFinder®
- Performance & Allocation: Current v. Target
- Manager / ETF Rankings v. Peers
- Investment Policy Statement Review
- Integrated Wealth Confidence Report
- Fee Transparency
- Portfolio Stress Test

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