



Flanagan Financial Services  
 15255 S 94<sup>th</sup> Ave Suite 500  
 Orland Park, IL 60462  
 630-235-5273  
 mflanagan@flanaganfinancialservices.net

## PLANNING PROCESS

At Flanagan Financial Services our objective is to work with individuals, families and those important to you in developing financial strategies designed around your specific personal and financial objectives.

Every situation is unique, so that is why we strive to develop financial programs that address your unique position in life.

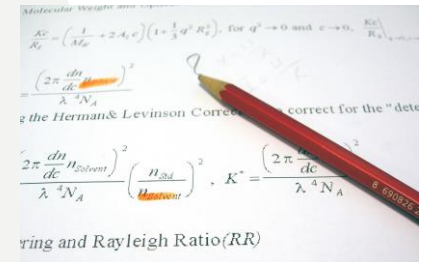
Let us help you, your family and those important to you by potentially creating and implementing a long-term financial approach.



### Introductions



Harvesting information critical to developing your customized financial strategy.



Designing a customized solution



Implementing your financial strategy(s)

## Review

Consistently monitor your personal & professional situations, implementing alternative strategies when necessary.



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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