

# FINANCIAL PLANNING SERVICES



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The following services are available for one year as part of a Financial Planning Agreement.

## Investment Planning

- Portfolio Evaluation – Assessment of risk-adjusted performance of current investment assets
- Client Aggregation/Portal Access – Creation of a personal portal to view all financial accounts and financial planning output

## Risk Management & Insurance Planning

- Life Insurance Need Evaluation
- Current Policy Review w/In-Force Illustrations
- Long-Term Care Need Review

## Estate Planning

- Review of Estate Planning Goals
- Review of Current Documents
- Preparation of Guidance to Attorney ("Attorney Letter")

## Financial Planning

- Financial Life Planning – Determination of what is important in your life
- Retirement Planning – Goals-based evaluation of financial readiness for retirement

## Family Support

- Children with Special Needs
- Living Transition Assistance
- Parental Special Needs

## Education Planning

- Education Savings Planning