

JWM 101

JORDAN WEALTH
MANAGEMENT

CONTACT

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JORDANWM.COM

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BUFFALO, NY 14225

GOALS BASED PLANNING:

JWM 101 goals vary from debt payoff to big purchases. If the destination looks different, so should the path that gets you there. We work together to identify and prioritize your goals. Then, we build a plan to work toward them. JWM 101 takes the guess work out of your personal finance. Let's work together for a brighter and healthier financial future.

BUDGETING:

ESTABLISH A BUDGET AROUND YOUR NEEDS, OBJECTIVES AND GOALS. WE UPDATE AS LIFE CHANGES.

- Establish a needs based budget, analyze your need and allocate your funds.
- Active Engagement and Update

SECOND LOOK:

REVIEW OF YOUR OTHER ACCOUNTS AND RISK TOLERANCE.

- Review Accounts
- Risk Management
- Risk Tolerance
- Allocation Review

ADVICE ON DEMAND:

PERSONALIZED ADVICE ON FINANCIAL DECISIONS, WHEN YOU NEED IT! AOD IS DESIGNED FOR HELP WITH DECISIONS SUCH AS HOME, CAR AND OTHER LARGE PURCHASES.

PLAN DETAILS:

- Annual Meeting
- Goal Setting
- Ongoing Evaluation
- Review of Outside Accounts
- Budgeting
- Debt Checkup
- Education
- Risk Temperature
- Investment Management
- All for \$125 per quarter
- Auto Payment available
- We accept check, credit card, or Bank ACH
- Payments made easy!
- One-Time plans are available as well. (Prices Vary by complexity of plan)

EDUCATION:

**FINANCE 101
MARKET UPDATE**

Securities and advisory services offered through Cetera Advisor Networks LLC, member FINRA, SIPC, a broker/dealer and a registered investment adviser. Cetera is under separate ownership from any other named entity.

Individuals affiliated with this broker/dealer firm are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

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NOTES:

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SECOND LOOK:

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PLAN DETAILS:

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