



People often view financial advice through a single lens, as investment advice.

However, there's a big difference between simply managing your investment portfolio (one aspect of your overall finances) and a holistic approach to coordinating your entire financial picture.

Only a full-service, independent wealth advisor provides the critical planning services and advice you need to eliminate conflicts and create alignment in your financial life.

Professional guidance can mean the difference between getting on track and falling short of your financial objectives.

## **10 Ways a Wealth Advisor Can Help You Move Closer to Your Financial Goals:**

1. Formalizing, prioritizing, and documenting your goals
2. Coordinating your investment, insurance, tax, retirement, and estate planning strategies
3. Reviewing and adjusting strategies to maintain alignment with your goals over time
4. Proactively managing risk across all aspects of your financial life
5. Measuring and reporting progress against your goals
6. Monitoring changes in your life and family situation and recommending adjustments to your strategies as needed
7. Remaining up-to-date on economic, tax, and financial market changes and legislation
8. Developing tax-advantaged wealth transition strategies for retirement and estate planning
9. Serving as a single point of contact to coordinate services and expertise across multiple disciplines, such as mortgage services, insurance, employee benefits, trust services, business succession planning, etc.
10. Working with your tax and legal advisors to coordinate and implement advice

We strive to help our clients in all these ways and more.

Give us a call to find out how we can help guide your financial future: 405.767.1230.



**Nithman Financial Group**

*Focusing On Your Financial Future*

405.767.1230 | [NithmanFinancialGroup.com](http://NithmanFinancialGroup.com)

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