ALDRED, GREENWELL & LANE

FINANCIAL PLANNING & INVESTMENT MANAGEMENT

our vision

To excel in our role as one of the industry's premier advisory organizations that is known for professional advisors who deliver comprehensive solutions through a process-driven approach.

our culture

Comprehensive Approach: Each Financial Advisor is backed by a team of specialists in investments and insurance who bring different points of view to your financial affairs. This comprehensive approach can help you build a truly diversified portfolio of retirement, wealth management, asset protection and estate planning solutions.

Teams: We are known for our unparalleled commitment to building highly effective advisory teams. Advisors who are part of teams see client situations from multiple perspectives leading to more comprehensive planning and a higher quality client experience.

Commitment: Our client-centric approach means that you will receive a strategic plan that focuses on your ambitions and future dreams - never on a product. We don't believe in rehearsed advice or pre-determined plans. Instead, you can expect a comprehensive strategy that has been created to meet your exact needs. If the goals you have today aren't the same goals you have tomorrow - don't worry. Your financial strategy will be designed to evolve with you over the years.

ALDRED, GREENWELL & LANE

FINANCIAL PLANNING & INVESTMENT MANAGEMENT

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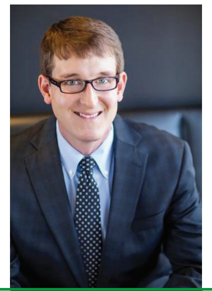
www.AGLplanning.com

ALDRED, GREENWELL & LANE

FINANCIAL PLANNING & INVESTMENT MANAGEMENT

our **planning team**



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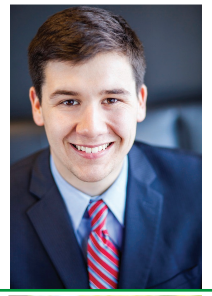

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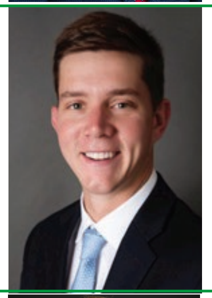

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OUR FIRM SPECIALIZES IN HELPING CLIENTS ANSWER:

- When can I retire?
- How long can my investments sustain my income?
- How can I optimize my withdrawal strategy to minimize taxes?
- What is my ideal Social Security and Pension claiming age?
- What is a more tax efficient way to leave money behind?
- What improvements can I make to my retirement plan?

**Implementation of specific products or services may result in commissions or fees outside of the financial plan fee. Periodic reviews of your financial plan may require a new planning agreement and result in additional fees.*
***Licensed but not practicing on behalf of MML Investors Services, LLC.*

how we **work**

level of engagement

We start each client relationship with a one hour complimentary consultation. We spend this time learning more about your personally and financially, this also gives you a chance to learn more about our firm.

CHECKUP

Complimentary analysis designed for those who want to see their current retirement outlook along with an investment and insurance analysis.

Retirement Outlook

- Are you on track?
- What financial weak spots do you have?

Investment and Insurance

- Investment Portfolio Analysis
- Insurance Needs Analysis

FOUNDATIONAL

Designed for clients who want an ongoing relationship along with guidance on the topics below.

Core Topics

- Financial Position Review
- Ongoing Lifestyle Stress Test
- Retirement Projections
- Protection Inventory

Goal Based Topics

- Investment Analysis & Implementation
- Insurance Analysis & Implementation
- Social Security Optimization
- College Projections

Financial Checkup + Foundational Strategies

FINANCIAL PRINT

Designed for clients who want comprehensive ongoing financial advice, FinancialPrint looks at your entire financial situation and acts as a GPS for the future.

Core Topics

- Cash Flow
- Detailed Accumulation Goals
- Basic Estate Review
- Employee Benefits Planning
- Retirement Distribution Planning

Goal Based Topics

- Income Tax Planning
- Tax Efficient Legacy Planning
- Advanced 401(K) Strategies
- Roth Conversion Planning
- Pension Claiming Strategies
- Lump Sum vs Installment Planning
- College Cash Flow
- Special Needs Planning

Coordinate with Outside Professionals

- Accountants
- Attorneys
- Bankers

Foundational Strategies + Ongoing Comprehensive

Financial Planning Process