

SIX KEY AREAS OF FINANCIAL PLANNING

Vision Based Planning seeks to bring the six key areas below into one financial plan. The outcome is to minimize gaps that can leave clients under-prepared and under-protected.



VISION
BASED PLANNING, LLC
Securities & Advisory Services offered through
Titleist Asset Management, Ltd
Member FINRA & SIPC

1

Cash Flow

BANKER

2

Insurance

*(Life, Health, Disability and
Long-term Care)*

INSURANCE AGENT

3

Investments

(Stocks, Bonds)

STOCK BROKER

4

Taxes

CPA, TAX ADVISOR

5

Retirement Plans

ACTUARY

6

Estate Plans & Protections

*(Wills, Trusts,
Medical Directives)*

ATTORNEY

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