What to Expect from Freedman Financial

Getting Your Financial House in Order

Net Worth & Cash Flow Planning
- Your Net Worth
- How Money Moves In & Out of Your Household
- One-time & Planned Large Expenses
- Good versus Bad Debt
- Smart Strategies for Spending Money
- Emergency Funding

Risk Management Planning
- Review of Existing Policies & Benefits
- Life Insurance Needs Analysis
- Disability Insurance Review
- Long Term Care Strategies

Investment Planning
- Portfolio Construction
- Asset Allocation Management
- Accumulation Strategies
- Cost Basis Analysis
- Stock Option Review
- Dollar Cost Averaging
- Portfolio Consolidation

Retirement Planning
- Managing Retirement Goals
- Social Security & Medicare Planning
- RMD Planning
- Retirement Income Strategies
- Review of Employer Sponsored Plans.
- Self-Employed Retirement Plans
- Annuities and Pensions

Tax Planning
- Analyze Tax Return
- Tax Comparison Considerations
- Taxable Gain/Loss Management
- Tax vs. Cash Flow
- Tax Withholding Issues
- Roth Conversions, IRA, SEP, etc.

Estate Planning
- Will and Trust Planning
- Review Power of Attorney
- Discuss Health Care Proxy and Living Will
- Gifting Strategies
- Estate Tax Planning
- Charitable Giving

Generational Care
- Advice to Heirs and Surviving Spouse
- Facilitation of Family Meetings
- Planning for Residential Downsizing
- Preparing for Emergencies
- End of Life Planning

Freedman Financial
WE CARE. DEEPLY.

Concierge Services

- Experienced team members delivering best-in-class service
- 72 Points of contact.. including in-person meetings, and proactive communication
- Secure access to your financial data anytime, anywhere.

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Financial Advice in a Language You Can Understand™