



My goal is to help address the needs and concerns for you, your family, friends, and co-workers. If there's any topic that you think we haven't covered yet and now you want to talk about it, I'm here for you.

This is a list of life stages or events when you should contact Alison:

Starting your career	Marriage	Buying a Home	Birth of a child
Job Promotion/Transition	Divorce	Moving/Selling Home	College
Retirement Transition	Inheritance	Legacy Planning	Death

This chart highlights the different services that our firm provides. Some of these items you may not need. However, I don't want you to have a problem, need, concern, or issue that does not get addressed because you were not aware that I can help you with these topics:

Budgeting (Debt Management)	Investment only Accounts	Insurance Review (Life, Disability, LTC)	Savings (Emergency acct.)
Retirement Planning Accumulation Years (401(k), 403(b), IRA, Roth)	QDRO (Assets from a divorce)	Pension Review (i.e. ASRS)	College Savings (cost & savings projections)
Income Planning (3-5 yrs prior to retirement, Where will your money come from & how much)	Wealth Management	What to do after a loved one passes away	Allocation Optimization (Diversification, where to invest)
Distributions in Retirement (When & how to receive income in your retirement)	How to handle an inheritance (Beneficiary IRA, IRA stretch, Non-Qual)	Leaving a legacy for your family	Social Security Analysis (when to take your benefits)
Business Owner Retirement accounts (SEP/Simple IRAs)	Job Transition (Rollover IRA, consolidation)	Healthcare in Retirement	Asset Protection (Risk Management)

Alison N. Stine, CFP®, RICP®

Cell: (949) 292-9280 Office: (480) 470-4227 www.stinewealthmanagement.com
6991 E Camelback Rd Ste D-300, Scottsdale, AZ 85251

*Securities and Advisory services offered through **GWN Securities, Inc.**, Member [FINRA/SIPC](#), a Registered Investment Advisor. 11440 N. Jog Road, Palm Beach Gardens, FL 33418. (561) 472-2700. Stine Wealth Management and GWN Securities, Inc. are separate companies.*

Certified Financial Planner Board of Standards Center for Financial Planning, Inc. owns and licenses the certification marks CFP® in the United States to Certified Financial Planner Board of Standards, Inc., which authorizes individuals who successfully complete the organization's initial and ongoing certification requirements to use the certification marks.