

Team Sullivan


Financial Life Planning Services



Over the course of your lifetime, your goals and circumstances can change. Through these ups and downs our team can assist with providing guidance on a number of topics.

| Goals-based Financial Planning GPS | Strategic Investment Management | Risk Management Analysis | Estate Planning Wealth Transfer | Balance Sheet Management | Tax | Value-added services |
|---|--|--------------------------|---------------------------------|---------------------------------|------------------------------------|--|
| Retirement income & expense planning | Risk Tolerance Assisment | Life Insurance Needs | Review of Estate Plan | Cash Flow Analysis | Tax Loss Harvesting | Annual Forecast Presentation |
| Life Event & Expense Planning | Risk-based Portfolio Allocation | LTC Insurance | Asset Protection Strategies | Budget Review | Capital Gain Distribution Analysis | Mid-Year Outlook Presentation |
| Create Income Distribution Plan via Bucket Strategy | Efficient Trading & Management | Disability Insurance | Eldercare Planning | Banking & Credit Management | RMD Analysis & Execution | Non-Financial Educational Events |
| Retirement "Red-Zone" Planning | Tax Optimization | Health Insurance | Giftng | Debt Analysis | Roth Conversions | Succession Planning |
| Social Security Analysis | Sophisticated Internal & External Research | | Probate Assistance | Emergency Funding | Stock Option Review | Coordination with Your Other Professionals |
| Employer Retirement Plan Review | Account Aggregation | | Philanthropy | Planning for Large Expenditures | | Career Change Analysis |
| Annuities & Pension Review | | | | Auto Lease Vs. Buy Analysis | | Sounding Board to Family & Friends |
| Education Planning | | | | | | Personal Financial Organizer |
| RMDs & Withdrawal Optimization Strategies | | | | | | |
| IRA Contributions & Roth Conversions | | | | | | |

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