RETIREMENT BUILT TO LAST

FIND OUT WHAT OUR COMPREHENSIVE PLANNING INCLUDES.

MFG
SINCE 1963

Planning Process	Wealth Management	Income Planning	IRAs & RMDs	Tax Planning	Social Security & Medicare	Financial Estate & Legacy
Discovery & FIT Analysis	Portfolio Review & Analysis	Review of Income Sources	IRA Contributions	Tax Impact Analysis	Soc. Sec. Basics & FRA	Beneficiary Planning & Review
Goals Driven Process	Goals-Based Portfolio Construction	401(k) Management	Roth IRAs	ROTH Conversions	Coordinating Spousal Benefits	Asset Protection
Custom Built for Your Family	Risk Management	Income Withdrawal Strategies	Rollovers	Tax Loss Harvesting	Benefit Claiming Strategies	Life & LTC Insurance Strategies
Team-Based Planning	Downside Protection	Pension Distribution Strategies	Penalty-Free Withdrawals	Managing Taxes	Medicare Strategy Options	Charitable Giving Strategies
Collaborative & Interactive	Fee-Sensitive Strategies	Income Sustainability Analysis	SEP IRAs & SIMPLE IRAs	Retirement Plan Analysis	Parts A, B, C, & D Medicare	Estate Documents Overview
Technology Driven	Advisory Accounts	Cash Flow Projections	RMD Distribution Strategies	Tax Advantaged Investments	Applying for Benefits - Avoiding Penalties	Titling of Assets
Ongoing Commitment by MFG	Annuities/Tax-Sensitive Investments	Inheritance Planning	Qualified Charitable Distributions	Cost-Basis Review/Strategy	Medicare Supplements & Advantage Plans	Tax-Efficient Asset Transfers

Plan Today. Invest for Tomorrow.