DAVIS FINANCIAL SERVICES

FINANCIAL MASTER PLAN PROGAM

If you want to pursue financial success, THE FINANCIAL MASTER PLAN PROGRAM is for you! This plan will encompass an ongoing relationship with Davis Financial Services to provide you with a complete, personalized financial plan to prepare you for the various financial seasons of life that lie ahead.

DFS
DAVIS FINANCIAL
SERVICES

WHAT'S INCLUDED

- Budget and major purchase planning
- Debt management analysis
- Income tax planning and preparation*
- Retirement planning
- Investment portfolio annual review
- Life, disability, and long-term care insurance recommendations
- Estate planning as needed
- Special situation planning (i.e. Sabbatical)
- Available anytime during the year to meet and answer your financial questions

*Subscription includes individual returns only. For Business/Corporate returns there will be an additional fee discussed in advance.

BENEFITS

- Keep you on track to meet and/or exceed your financial goals
- Minimize income taxes
- Lessen the impact of unforeseen financial needs
- Equip you to make better financial decisions
- Help build confidence in your financial future
- Position you to help and serve others

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