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Your Complete, Comprehensive Financial Planning Experience

Your financial life journey deserves a complete, comprehensive plan. We are dedicated to getting to know you, your financial needs and your investment goals in order to tailor a plan that will move with you throughout your journey.

We are passionate about designing a plan that will address and support all of your financial needs as your financial journey is made up of more than only your current investments. Your plan involves reviewing and evaluating every possible financial need you have now or in the future. A review checklist is our way of making sure we proactively examine and prepare all aspects of your comprehensive financial plan.

We are always here to answer all of your questions and address any concerns in regard to your financial life journey. Call us today so that we can start on your complete, comprehensive plan.

This checklist will be the guide during our review discussions:

Product Education and Updates

- Life insurance
- Fixed Annuities
- Disability Insurance
- Long-term care

Estate Planning and Charitable Planning

- Review of trust/wills/POA's estate valuation
- Special needs planning/gifting strategies

Insurance Review

- Review of existing life insurance policies
- Review of existing long-term care policies
- Review of disability policies
- Review of existing fixed annuity policies

What's On Your Mind

- Discuss any questions or concerns not listed above

First/Lastname
Company Name
000.000.0000
email@address.com

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