

Financial Planning Services



Features At-A-Glance

- Retirement Planning
- Cash Flow and Tax Planning
- Education Planning
- Risk Management / Insurance Planning
- Estate Planning

Financial planning is a valuable tool in analyzing your entire financial picture and to help your assets work at their maximum potential to meet your financial goals. Not every aspect of financial planning will necessarily apply to every client. We begin by focusing on your priorities first, analyzing additional areas over time. And since life circumstances often change, we update your analyses as needed.

Retirement Planning

For many people, pensions, 401(k)s and social security may not be enough to maintain your standard of living. Put this together with longer life expectancies and you have one of today's greatest financial risks: outliving your assets. Together we will develop and target a plan to help you reach a comfortable retirement. As retirement approaches, we will develop an appropriate method of distributing proceeds from retirement accounts.

Cash Flow and Tax Planning

Our analysis will establish whether you are saving enough to meet your goals, investing enough of your assets, and keeping enough in a cash reserve. We examine whether you are taking advantage of appropriate tax breaks and tax-deferred vehicles such as IRAs, 401(k)s, 403(b)s, defined-benefit and other pensions.

Education Planning

Education costs are growing faster than inflation. Planning early and well enables you to provide your children with a good education without risking your own retirement.

Risk Management / Insurance Planning

Protection against catastrophic loss can be achieved with appropriate utilization of life, disability, long-term care, homeowners and automobile insurance. Remember, as fee-only advisors we do not sell or promote any insurance products. Rather we can help determine an appropriate level of coverage.

Estate Planning

We will ascertain whether or not your assets are favorably positioned and correctly titled and whether or not you should discuss a trust with your estate planning attorney.

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