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Topics where Financial Advisors can add value

- Conducting regular reviews of your Retirement Income Plan and looking for ways to optimize your strategy.
- Maximizing savings toward retirement. Providing education on how much to save and where to save.
- Conducting regular 401k reviews. Reviewing your available investment options and existing asset allocation.
- Setting goals and keeping on track, staying disciplined.
- Providing referrals to Accountants and Attorneys for Will or Trust reviews and Estate Planning Strategies.
- Behavioral Finance and Coaching. Staying disciplined to your strategy and not panic selling when markets correct.
- Selecting the appropriate mix of stocks and bonds for each retirement account.
- Portfolio Management: Asset Allocation, Sub Asset Allocation, Choosing Securities, Monitoring, Rebalancing.
- Determining if and when Roth Conversions make sense.
- Financial Planning Roadmap Topics
- Quarterly Meetings to keep on track and informed about markets and global trends.
- Tax Efficient Strategies: Tax harvesting, deciding what type of investments to hold in each account, municipal investments.
- Charitable planning strategies
- Potentially reducing fees of existing accounts managed outside Evergreen Wealth Management.
- Insurance reviews and planning
- Identifying common risks of retirement and investment planning and developing strategies to mitigate against those risks.
- Income Planning: Providing education about common strategies to generate income and offering guaranteed income streams. Assistance determining which accounts to withdrawal from first and last.
- Social Security and Pension Maximization
- Customization – Utilizing a range of investment strategies including boutique money managers, tactical strategies.
- Utilizing benefits of passive management ETF’s
- Having a trusted advisor along your retirement journey to offer guidance and transparency along the way.

Securities offered through Regulus Advisors, LLC. Member FINRA/SIPC. Investment Advisory Services offered through Regal Investment Advisors, LLC., an SEC Registered Investment Advisor. Regulus Advisors and Regal Investment Advisors are affiliated entities. Evergreen Wealth Management is independent of Regulus Advisors and Regal Investment Advisors.