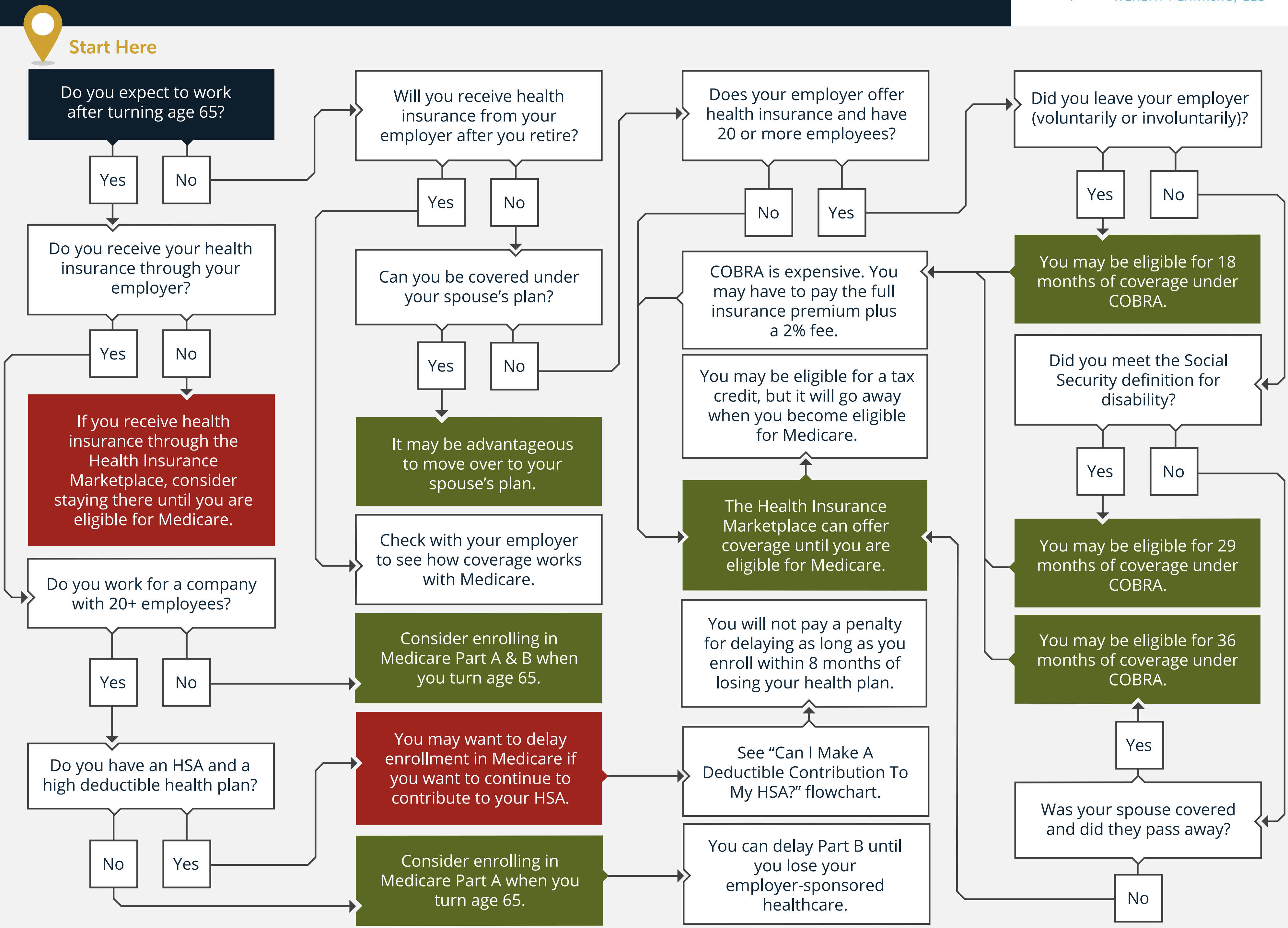
2024 · WILL HEALTHCARE CHANGE AS I TRANSITION INTO RETIREMENT?

VISION WEALTH PLANNING, LLC



About Vision Wealth Planning

VISION
WEALTH PLANNING, LLC

"We combine sophisticated financial planning with expert investment management solutions that are always tied together to seek the highest probability of successful financial outcomes."

What are the elements that need to be tied together? While that varies some depending on the situation, the general areas are:

- Investing - tax managed, aligned with client goals and preferences
- Tax planning - proactive, multi-year strategies
- Cash flow
- Retirement planning - max Social Security, optimal accumulation & distribution vehicles/strategies
- Affairs planning - Advance Medical Directive, Power of Attorney, Will, Trust, Asset Titling, Beneficiary Designations
- Risk management - Insurance coverages, risk avoidance

We do much of the above and coordinate with other professionals on other aspects. We are involved in all areas to provide cohesive advice, implementation and outcome on a technology-driven platform that will simplify your life.

Mark Smith, President
4860 Cox Road, Suite 200 Glen Allen, VA 23060
mark@vwplanning.com | (804) 368-0854 | www.vwplanning.com