THE FINANCIAL CLARITY ADVANTAGE

We believe our clients can achieve their *ideal financial futures* with well-defined goals and a clear path to follow, forged and navigated by objective, client-focused advisors. The Financial Clarity Advantage ***5-step approach*** includes investment planning, employer benefits planning, retirement income security planning, and estate planning.

Goal Achievement Follow Through

5 

We make certain that your plan is put into action and that each component is professionally implemented and fully integrated. A personalized service schedule is determined. We also offer annual financial planning services to help ensure that your plan remains current and continues to meet your objectives.

The Implementation Roadmap

4 

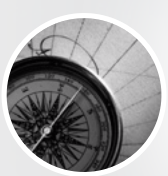
We present The Financial Clarity Advantage Summary Document detailing how to best meet your stated objectives. Every plan is custom designed and all of our recommendations are in writing. With our guidance, you will have a clear vision of how your goals can be achieved.

Uncovering the Disconnects

3 

We perform an analysis of your situation to determine where your current arrangements are inconsistent with your objectives. We create models reflecting your future situation to identify coordination gaps and planning opportunities. We discuss our findings with you and mutually explore alternatives.

The Data Navigator

2 

We gather comprehensive data and conduct a cross disciplinary review of your complete financial situation. We create a model and review it with you to ensure we have a clear understanding of where you currently stand.

The Mutual Alignment

1 

We carefully work with you and your family to fully explore, understand and develop your ideal vision, your values and your goals. Here we identify and prioritize what is most important to you.

NorthLanding
Financial Partners, LLC

Investment Planning

We assess your investment portfolio and savings strategies. We discuss how to better align the management, diversification, and tax exposure given your risk tolerance and distribution need.

Employer Benefits Planning

We explore what benefits your employer offers – insurance, qualified plans, and nonqualified plans – to ensure their greatest utility while working and at retirement.

Retirement Income Security Planning

We create a model of your current financial situation and discuss what action you can take to maximize the likelihood of meeting retirement expenses through life expectancy.

Estate Planning

We review your estate documents and beneficiary designations to ensure your family wealth passes efficiently to whom you want, when you want. We assess the need for both life and long-term care insurance.

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