KWB WEALTH®

LIST OF SERVICES

COMPREHENSIVE FINANCIAL PLAN

TAX PLANNING

- Tax loss harvesting
- Roth conversion strategies
- Inherited asset planning
- Investment tax statements provided to your CPA
- Annual review of tax return
- Charitable giving

INSURANCE

- Review of existing policies
- Insurance needs analysis
    - Long term care
    - Liability policies
    - Key employee insurance
    - Medicare advice

ESTATE PLANNING

- Facilitate trust preparation
    - Revocable, Irrevocable and Asset Protections trusts
    - Power of Attorney, Health Care Directives, Will
    - Charitable Designation trusts
- Beneficiary updates across all assets
- Managing estate taxes
- Tax efficient gifting
- Managing generation transfers
- Guardianship of minors

INVESTMENT PLANNING

- Withdrawal strategies
- Time horizon planning
- Employee Stock Option Planning
- Account consolidation
- Restricted stock unit planning and Employee stock ownership plans

RETIREMENT PLANNING

- Social Security analysis
- Goal and vision setting
- Cash flow projections
- Executive Compensation Plans
- Roth funding strategies
- Income Needs Analysis
- Annuities and pension
- Funding and asset allocation recommendations for employer sponsored plans
- Self-employed and small business plans

LEGACY PLANNING

- College planning
- Business Succession and exit strategies
- Gifting during lifetime
- Educating Beneficiaries
- Planning for elders

EXTRAS

- Various Educational Webinars and client appreciation events throughout the year
- Specialized blog posts from our team