Managing Your Wealth Through Loss

On your own, but not alone.

NORTHSTAR
FINANCIAL PLANNING

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northstarfp.com

WEALTH MANAGEMENT SERVICES

Fee-Only Fiduciary Advice

- Understand what money really means to you
- Prioritize your entire financial life
- Set goals, monitor and adjust as needed
- Create an action plan that moves you forward
- Implement your personalized investment plan
- Feel confident with guidance and reporting

At Northstar, we help you think about, then confidently act upon, your wealth and your life.

We help you rediscover life on your own.

THE JOURNEY FORWARD

Northstar's ongoing holistic Wealth Management service lets you focus on what is most important in your life. We help with the rest.

As your thinking partner, we help you attain the financial security you desire and stay on track to reach your financial life goals. We help:

- Create a new vision of the future.
- Stress-test your life and financial options.
- Decide how best to allocate your resources.
- Define your risk tolerance.
- Maintain an action list with timelines.
- Discuss your money and your life in a comfortable judgement-free zone.
- Assist in completing settlement tasks.

We offer a complimentary "Get Acquainted" Meeting to discuss your situation.

LOSS SUPPORT SERVICES

1. ORGANIZE

First, we listen to understand your personal circumstances and then create a path to make it manageable. We help:

- Support you through the Probate Process.
- Coordinate with your trust and estate attorney.
- Sort and prioritize notices, tax, estate, investments, and benefits.
- Retitle accounts and change beneficiaries.
- Claim life insurance benefits, social security, pension, veterans etc.

An action list is maintained, including resources and timelines, to ensure tasks are completed in a timely manner and to monitor progress.

2. PLAN

We help you understand your new financial situation. The goal is to gain peace of mind in knowing that you are financially OK for now.

- Summarize assets and liabilities with in-depth tax analysis.
- Identify sources of income for the next 3-24 months.
- Assess upcoming cash flow changes.
- Review financial resources and commitments, including real estate.

3. TAKE ACTION

Our compassionate team of CFP® professionals helps you complete tasks, manage your new financial position, and gain the control and confidence you desire.

COST OF SERVICES

Our services best address the financial needs of those with $1,000,000 or more of investable assets. We are happy to provide a customized quote at our complimentary Discovery Meeting.

How We Help

Our expert team can help answer the following concerns and many more as you move through this process:

- What do I do now?
- Am I going to be ok?
- How do I manage the finances moving forward?
- Where will the money come from?
- How do I manage the estate and estate settlement process?
- What are my life and financial options?

Let us help you take care of what matters most.

With over 100 years of combined experience, our dedicated team of Fee-Only CFP® and CeFT® professionals take a holistic approach to Wealth Management and Financial Transitions Planning.

NORTHSTAR
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We walk beside you through one of life's greatest challenges – adjusting to the loss of your spouse.

Northstar provides support, education, and resources to widows nationally and is the proud sponsor of the Southern NH chapter of the Modern Widows Club.

modern WIDOWS CLUB — National non-profit dedicated to empowering widows to thrive.

Schedule Your Complimentary Consultation Today

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