WHAT WE DO

INVESTMENT PLANNING

- Asset allocation based on risk tolerance and goals
- Portfolio performance reviews
- Existing IRA, 401(k) and 403(b) plan reviews
- Investments monitoring
- Individual security review
- Current market and economic updates
- Retirement income planning

FINANCIAL PLANNING

- Determine risk level and realistic goals
- Goal Planning & Monitoring
- Work with CPA
- College planning and 529 plans
- Charitable gifting
- Tax-efficient strategies
- Social Security strategies
- Insurance review
- Long-term care planning
- Asset protection strategies

ESTATE PLANNING

- Work with attorney
- Trust, will, TOD review
- Power of attorney
- Estate tax planning
- Legacy planning
- Trustee delegation
- Beneficiary designation review
- Facilitate transfer of investments to trust/ beneficiaries

MISCELLANEOUS

- Monitor changes in your life
- Access to statements and performance online
- Provide referrals to other professionals
- Host seminars on current topics
- Host client appreciation events
- Provide lending solutions*

FAGAN
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