Tarver
ASSET MANAGEMENT GROUP
of
RAYMOND JAMES®

The Investment Stewardship Retirement Plan

Mr. & Mrs. John R. Smith

1

Open new accounts and initiate transfer

2

Receive assets from 401K, Pension, etc.

3

FINANCIAL STATEMENTS
Balance Sheet
Income Statement
Income Projections
Family Tree

4

INVESTMENT POLICY
Questionnaire
Investment Objectives
Risk Tolerance
Asset Allocation

5

Structure and implement portfolios

6

LIVING PLANNING
Retirement Income Projections
Pension
Social Security
Lifetime Income Solutions
Long-Term Care
Life Insurance

7

ESTATE PLANNING
with attorney to revise will, set up trusts, execute durable powers of attorney, titling of assets, beneficiaries, etc.

8

QUARTERLY REVIEWS
Goal Planning
Monitoring
Financial Organizer