TAYLOR FINANCIAL GROUP, LLC
THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE

FINANCIAL FUTURE PLANNING CHART™

Services We Offer

Investment Planning

- [ ] Review of Portfolio
- [ ] Asset Allocation
- [ ] Time Horizon Planning
- [ ] Titling and Beneficiary Designations
- [ ] Account Aggregation
- [ ] Monitoring of Outside Accounts, such as 401(k), etc.
- [ ] Investment Policy Statement
- [ ] Stock Concentration

Estate Planning

- [ ] Review of Estate Plan
- [ ] Minimize Estate Taxes
- [ ] Wills & Trusts
- [ ] Living Will & Health Care Proxy
- [ ] Power of Attorney
- [ ] Irrevocable Life Insurance Trusts
- [ ] Guardians for Minor Children
- [ ] Charitable Giving
- [ ] Probate Assistance

Retirement Planning "WealthMatch™"

- [ ] Review of WealthMatch™ Plan
- [ ] Retirement Goal Setting & Bucket List Items
- [ ] Social Security Analysis
- [ ] Cash Flow Analysis
- [ ] IRA Contributions and Roth Conversions
- [ ] Review of Retirement Plans
- [ ] Annuities and Pensions
- [ ] RMD's and Withdrawal Strategies

Risk Management & Insurance Planning

- [ ] Annual Review of Existing Policies
- [ ] Life Insurance Needs Analysis
- [ ] Long Term Care Insurance Analysis
- [ ] Disability Insurance Analysis
- [ ] Health Insurance Review
- [ ] Homeowner's or Renter's Insurance Review
- [ ] Liability Coverage
- [ ] Health Savings Accounts
- [ ] Medicare Advice

Cash Flow and Budget

- [ ] Reviewing Goals, Expenses and Budgeting
- [ ] Review of Income Sources
- [ ] Banking and Credit Management
- [ ] Review of One-Time Expenses
- [ ] Planned Large Expenses
- [ ] Emergency Funding
- [ ] Dollar Cost Averaging
- [ ] Mortgage Review
- [ ] Lines of Credit

Assistance to Loved Ones

- [ ] Gifting
- [ ] College Planning
- [ ] Caring for Elderly
- [ ] 529 College Savings Plans
- [ ] Roth IRA's for Children
- [ ] UGMA/UTMA
- [ ] Establishing Trusts
- [ ] Paying Off College Loans
- [ ] Divorce Planning

Tax Planning

- [ ] Tax Sensitive Investing
- [ ] Review of Cost-Basis and Gains
- [ ] Executive Compensation
- [ ] Carry Forward Losses
- [ ] Tax Loss Harvesting
- [ ] Business Succession Planning
- [ ] Potential Roth Conversions
- [ ] Health Savings and Flexible Spending Accounts
- [ ] Tax Return Review

In addition to our services listed above, we also:

- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Planning for incapactity.
- Coordinate with other advisors such as your attorneys and accountants.
- Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.
- Work to ensure that your WealthMatch™ plan is on track to help guide you on your journey toward well-being and prosperity.