TAYLOR FINANCIAL GROUP, LLC
THE RIGHT PARTNER CAN MAKE ALL THE DIFFERENCE
795 Franklin Ave, Bldg. C, Suite 202, Franklin Lakes, NJ 07417

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.