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

Taylor Financial Group, LLC
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FOCUSED WEALTH PLAN

Financial planning tailored to your individual objectives

Talk to your Advisor about signing up for this ***COMPLIMENTARY*** *service!*

1 Determine Family Index Number

The individual rate of return designed to help you work toward achieving your goals and objectives with confidence

Allows your advisor to construct a portfolio designed to help you achieve or beat your number over the long term with the least amount of risk

Used as a benchmark to gauge performance over the length of the plan

Updated at least on an annual basis during annual client review

2 Personalized Cash-Flow Based Planning

Narrowly tailored to identify and address your specific goals and objectives

Interactive, cash-flow based wealth planning platform allows planner to customize recommendations

Stress test recommendations under different market conditions

Data protection backed by a modern data center meeting or exceeding industry standards

3 Risk Management Planning

Comprehensive analysis of life, disability, long-term care and other risk management solutions

Assess current risk management coverage and align recommendations with risks posing the greatest threat to your financial future

Partner with companies meeting our stringent due diligence requirements to find the most efficient and suitable solutions for your particular needs

Create clarity, predictability and cost efficiency in your risk management portfolio

4 Social Security Analysis

Custom analysis of every Social Security claiming option available

Compare and analyze every social security claiming strategy

Develop your own personal claiming strategy based on your unique situation

Life expectancy zones help clients find the most appropriate claiming strategy based on their health and family history

Sources: *The Wall Street Journal, The Best Online Tools for Retirement Planning and Living, January 19, 2015 | SocialSecuritySolutions.com | emoneyadvisor.com/Products*

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FOCUSED WEALTH PLAN
DOCUMENT REQUEST & SUPPLEMENTAL INFORMATION

Document Request

Investments:

- ☐ Most recent investment statements
- ☐ Annuity contracts
- ☐ Most recent annuity statements
- ☐ Retirement plan statement and plan summary with investment alternatives
- ☐ Social Security statements

Tax:

- ☐ Two most recent federal and state income tax returns
- ☐ Gift tax returns, Form 709
- ☐ Cost basis of all assets, estate tax returns for inherited property, Form 706

Property:

- ☐ Most recent mortgage statement, origination date, term, origination amount, interest rate and current balance

Employment:

- ☐ Most recent pay stubs
- ☐ Employment contracts
- ☐ Employee benefit statements and booklets
- ☐ Pension documents and latest statement
- ☐ Stock option and restricted stock statements
- ☐ Deferred compensation arrangements
- ☐ Bonus plans

Insurance:

- ☐ Life insurance policies and statements (illustrations if available)
- ☐ Long-term care insurance policies and statements (illustrations if available)
- ☐ Disability insurance policies and statements (illustrations if available)
- ☐ Property and casualty and personal liability policies

Business Interests (please attach additional sheet if necessary)

Name of Business(es)

Business Purpose

Business Equity Type *(i.e. C-corp, S-corp, LLC, Partnership)*

Business Valuation

Ownership Percentage