

# FINANCIAL PLANNING SERVICES

You are looking for the right fit. Which plan will provide you with the targeted focus to help alleviate your concerns and to draw the road map to get you where you want to go? Take a look at what our plans include. Let's discuss which one is right for you.

SERVICES	PLANNING ADVANTAGE II	PLANNING ADVANTAGE	EXECUTIVE ADVANTAGE
Financial Goals	provided	provided	provided
Net Worth & Cash Flow	provided	provided	provided
Income Tax Planning	basic	basic	advanced
Education Funding	provided	provided	provided
Retirement Planning	basic	basic	advanced
Current Portfolio Analysis	provided	provided	provided
Proposed Portfolio Recommendations †	provided	provided	provided
Insurance Needs Analysis	provided	provided	provided
Estate Planning	basic	basic	advanced
Restricted Corporate Stock Strategies			provided
Corporate Stock Options Strategies			provided
Deferred Compensation Planning			provided
Stock Concentration Planning			provided
Distribution Election/Employment Transition			additional
Expatriate Considerations/Pension Timing			additional

Planning Advantage II is an every other year program. For further details, including fees and restrictions, please see our Firm Brochure.

INTEGRITY | OBJECTIVITY | PROFESSIONALISM | EXCELLENCE | TEAMWORK

*Partnering in planning for your peace,  
prosperity and purpose.*

