

Feel confident  
— *and spiritually at peace* —  
about **your financial future**



O. 919.554.0080 | F. 919.554.3922

13341 Falls of Neuse Road, Suite 201  
Raleigh, NC 27614

[carlsoninquiry@carlsonfinancialservices.com](mailto:carlsoninquiry@carlsonfinancialservices.com)

[www.carlsonfinancialservices.com](http://www.carlsonfinancialservices.com)

Empower yourself  
*Spiritually & Financially*

Call our office at  
**919.554.0080**  
and let's talk!



We are an independent financial services firm helping individuals create retirement strategies using a variety of investment and insurance products to custom suit their needs and objectives.

All written content on this site is for information purposes only. Opinions expressed herein are solely those of Carlson Financial Services, LLC, and our editorial staff. Material presented is believed to be from reliable sources; however, we make no representations as to its accuracy or completeness. All information and ideas should be discussed in detail with your individual advisor prior to implementation. Investment advisory services offered by duly registered individuals on behalf of ChangePath, LLC a Registered Investment Adviser. ChangePath, LLC and Carlson Financial Services, LLC are unaffiliated entities. Insurance products and services are offered through Carlson Financial Services, LLC. The presence of this website shall in no way be construed or interpreted as a solicitation to sell or offer to sell investment advisory services to any residents of any State other than the State of NC or where otherwise legally permitted.

Carlson Financial Services, LLC, our advisory team and Roy Carlson are not affiliated with or endorsed by the Social Security Administration or any government agency. This material has been prepared for informational purposes only. It is not intended to provide, and should not be relied upon for, accounting, legal, tax or investment advice.

Not registered as an IA (investment advisory) services. ARE-6165 | 19573 - 2019/12/19



# Who we are



Everyone sees finances in a different way, and Carlson Financial Services is no exception to that. We believe you are the steward of your financial household. Our role is to provide the planning framework for you to make financial decisions consistent with your faith and values. Here, you are the focus. Working with Carlson Financial Services means working with a team who cares. Your needs, objectives and desires are always the priority. Our mission is to provide a platform where you can align your giving, spending and savings to be consistent with your faith and your family's priorities. We're here to help you make a plan for your future, and we'll be with you every step of the way.

# Get to know the process

## Cash management and reserves.

Cash-flow system and adequate and appropriate cash reserves.

## Tax diversification.

Current tax control and suggested tax diversification.

## Investment Management.

Current asset allocation, tactical and strategic asset allocation, risk management and suggested allocation.



At Carlson Financial Services, our process includes examining the six key areas of financial planning from first, a spiritual perspective and then from a mechanical perspective. This allows you to have a comprehensive plan that prioritizes and monetizes your goals and creates an implementable action plan.

## Protection planning.

Premature death, disability and long-term care.

## Retirement and redirection.

Projections and what-if scenarios.

## Estate design.

Wealth transfer and estate analysis.

# How we can help

As an independent firm, Carlson Financial Services understands each client is unique, which is why our approach takes into account your particular goals and objectives, allowing us to customize each area of your financial strategy.

## Here's what Carlson Financial Services can offer you:

- Fee-based Financial Planning.
- Fee-based Asset Management.
- Insurance Services.
- Biblical Financial Stewardship Workshops.



How can Carlson Financial Services be of service to you?

Call our office at **919.554.0080** and let's talk!