We Make the Complex Simple

LifeSpan Financial Strategies

Investment Planning	Review of Estate Plan	Retirement Planning	Insurance Planning	Cash Flow & Budgeting	Legacy Planning	Tax Planning
Access to Customized Investment Portfolios	Wills	Goal Setting	Review of Existing Policies	Review of Income Sources	Gifting	Tax Sensitive Investing
Review of Portfolio	Power of Attorney	Social Security Analysis	Life Insurance Needs Analysis	Setting Goals, Expenses & Budgeting	College Planning	Review of Cost-Basis
Asset Allocation	Living Wills/Advanced Medical Directives	DROP/Pension Review	Long Term Care Insurance	Debt Management	Caring for Elderly Parents	Review Realized Gains
Time Horizon Planning	Health Care Proxy	IRA Contributions & Roth Conversions	Disability Insurance	Review of One-Time Expenses	529 College Savings Plans	Carry Forward Losses
Withdrawal Strategies	Irrevocable Life Insurance Trusts	Review of Employer-Sponsored Plans	Health Insurance Review	Planned Large Expenses	UGMA/UTMA	Tax Loss Harvesting
Review of Employer Accounts such as 401(k), 457(b), 403(b)	Estate Taxes	Annuities & Pensions	Insurance Policy Placement	Emergency Funding	Establishing Trusts	Deductions & Credits
Risk Analysis	Guardians for Minor Children	Required Minimum Distributions	Liability Coverage	Dollar Cost Averaging	Successor Trustee	Roth Conversions
		Review of Employee Benefits	Health Savings Account	Mortgage Review	Review of Beneficiaries	Tax Return Review
			Medicare Advice		Special Needs Trusts and Charitable Remainder Trusts	

In addition to our services listed above, we also:

» Coordinate with other advisors such as your attorneys and accountants.

» Hold regular meetings and ensure that all planning is well coordinated and implemented.

» Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.

» Coordinate family legacy meetings to ensure generational alignment.