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WEALTH MANAGEMENT

THE WEALTHPRINT® FINANCIAL PLANNING PROCESS

LEARN MORE ABOUT WEALTHPRINT™

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RETIREMENT PLANNING

Ensure you don't outlive your retirement savings by planning for the expected and unexpected

How much money should I be investing?

How will inflation affect my retirement income needs?

What are the chances of outliving my savings?

How will taxes affect the longevity of my portfolio?

Start working with a financial advisor to create your own personalized financial plan.

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ESTATE PLANNING

Leave a legacy

Did you know that your assets are not protected from probate with only a will?

Will your heirs be burdened with up to 40% in federal estate taxes?

What will happen to your loved one's inherited assets in the event of divorce or legal troubles?

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Consult with a financial planner to start eliminating possible estate taxes.

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INSURANCE PLANNING

Protect your loved income, your assets and your loved ones

How will your family replace your income in the event of your death?

Will your family be able to meet monthly expenses if you become disabled for an extended period of time?

How will you pay for unexpected nursing home or assisted living expenses?

Insurance is the foundation of a strong wealth management strategy. Taking care of the "what ifs" will allow you to focus on retirement planning with confidence.

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BUSINESS PLANNING

BUSINESS PLANNING

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Create a business growth and succession plan

How do I make sure my family is taken care of even if they don't want to inherit the business?

How do I plan for selling my business in the future?

What options do I have for minimizing taxes on my business income?

Business owners have very specific needs, and our no-obligation business planning analysis will help you discover the pitfalls you need to be aware of.

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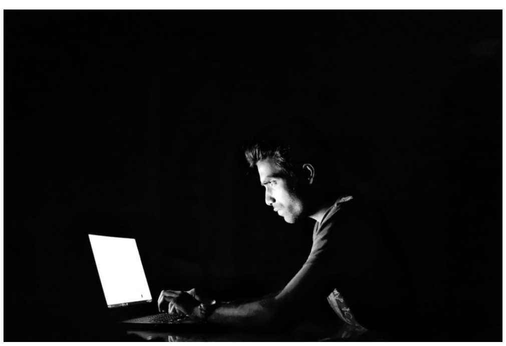

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By Ron L. Brown, CFP® Personal Finance No Comments

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