





**INVESTMENT ADVISORY ([HTTP://FINPLANESERVICES.COM/?SERVICE=GYNACOLOGY](http://FINPLANESERVICES.COM/?SERVICE=GYNACOLOGY))**



**SUPERVISORY SERVICES ([HTTP://FINPLANSERVICES.COM/?SERVICE=NEUROLOGY](http://FINPLANSERVICES.COM/?SERVICE=NEUROLOGY))**

# WE TAKE TIME TO UNDERSTAND YOUR CIRCUMSTANCES

 Discussing Your Needs and Goals

 Gathering Relevant Information

 Helping to AVOID Costly Errors and Current Financial Mistakes

 Creating a Clear 'Plan of Action' to Make Wise Financial Choices

 Keeping You In Control of the Planning Process Implementation



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## QUARTERLY REVIEW

Reporting and clearly demonstrating your Net Internal Rate of Return



## MANAGE

Actively manage personal assets and retirement plans (401k, IRA, 403b, college 529, investments & other retirement plans)



## MANAGE

Managing account allocations



## ESTATE

Strategies to avoid the cost and time of probate system. Pass your estate to who you want, when you want, how you want and at the lowest possible cost.



### PLANNING

Retirement cash flow and taxes



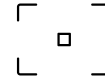
### MONITOR

Monitoring IRS Required Minimum Distributions (RMD)



### INDEPENDENT ADVISORS

Truly independent and unbiased advise with efficient investment account services.



### INFORMATION

Disclosing all fees and possible conflicts of interest before action is taken



## OVERVIEW

**FINANCIAL PLANNING IS A PROCESS** of understanding the Stages and Transitions in LIFE, to crystallize short and long-term goals and to identify the RISKS that *will derail* an otherwise good **FINANCIAL PLAN**

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Investment	Planning	Supervisory	
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### INVESTMENT ADVISORY

- PoPortfolio evaluation and risk assessment
- Recommendations in your best interest
- Establish TD Ameritrade Institutional accounts
- Establish education planning accounts (Tax Credit)

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Investment\_Mgmt\_loud



## GET A FREE CONSULTATION

We would be honored to help you plan 1 your future.



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Message

SEND MESSAGE → ()

## ABOUT US

We provide financial planning, investment advisory, asset supervisory and tax preparation services.



## WHY CHOOSE US ?

### HIGH QUALITY SERVICES

We operate under a fiduciary standard, which means we are always looking out for your best interest. Our focus is on maximizing the return on your investments.

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## GET IN TOUCH

 4520 Northwestern Dr Zionsville, IN 46077

 (317)228-6222

 Brent@finplansvcs.com



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