

Investment Strategy Review

How is your investment strategy working out? What should you do with existing or anticipated investments? How would you manage the following?

- Lump sum retirement rollovers
- Insurance or divorce settlements
- Proceeds from the sale of a home or business
- Inheritances
- Lottery winnings
- Employment bonuses

Ultimately, investments will provide income – whether to you, your creditors, your heirs, or the IRS. Which investment should you take income from? How can you control taxes in both the accumulation and distribution phases of your investment strategy? Will you have enough to support your lifestyle for the remaining lifetime of both you and your spouse? How much of your investment portfolio is set aside to cover the expenses of a long term illness?

These and other important issues should be reviewed periodically as your situation and economic conditions change significantly. Our Investment Strategy Review provides the following for you:

- Discovery of values-based goals (Who do you want to benefit and why? What do you **want** to happen?)
- Summary of **Prioritized** Goals with
 - Time frame
 - Money needed

- Feasibility Analysis for achieving goals
- Existing Portfolio Asset Allocation
- FinaMetrica Risk Profile
- Current Balance Sheet
- Account Ownership Review
- Estate Distribution of Accounts
- Analysis of current situation (What **will** happen?)
- Consideration of special needs
- Discussion of Income Tax Control Options
- Proposed Investment Policy Statement

Why not verify that your investments are positioned as effectively as they should be by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time?

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!