Would you like to be MORE CONFIDENT IN YOUR FINANCIAL LIFE?

Sequoia Financial Strategies offers a variety of services to help you plan for your financial goals. Schedule a no-obligation consultation to discuss which option works best for you.

ONE-TIME PLANNING SERVICES	INVEST From 1.33% annual advisory fee on account balance**	CONSULT Consultation with Financial Professional	PLAN Comprehensive Financial Planning
• The Basics-Financial documents preparation (statement of financial position, cash flow, and insurance inventory)	X	X	X
• Financial Goals Plan - (Includes executive summary and recommendations in all six areas of financial planning)			X
• Income Planning & Employee Benefits			
- TPAF Options Analysis			X
- Social Security Maximization			X
- Pension Maximization			X
- How to draw on investments for your lifetime (turn into a paycheck); Withdrawal hierarchy; Tax efficiency			X
- Required Minimum Distributions (RMD) Strategies			X
- Are you in the confidence zone?			X
• Insurance and Risk Management		X	
- Health Insurance Review		X	X
- Life, disability, and other insurances review (needs analysis and review of existing policies)		X	X
- Property and Casualty Review (home, auto, umbrella)*		X	X
- Risk Management (Liability) Analysis		X	X
- What are you afraid of? (Analysis)		X	
• Tax Planning			X
• Estate Planning			X
• Investing			
- Roth Conversions, 403b, 457, IRA.	X	X	X
- Investment Risk Score and Test	X	X	X
- Asset Allocation Plan	X	X	X
ONGOING SERVICES			
• Accounts Invested in Fee-based Account ** account with access to no load and index funds (no commissions)	X		
• Check In	X		X
• Annual Investing or Financial Plan Review	X		X
• Ongoing Financial Advice	X		X
• Annual Performance Report and Year In Review	X		X

*Additional third-party professional fees may apply
**Advisor directed, non-discretionary account.

Comprehensive Planning is Complimentary with 250k invested.

Start Planning Today

CALL (201) 874-8723

SEQUOIA FINANCIAL STRATEGIES

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