

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

- The Basics-Financial documents preparation (statement of financial position, cash flow, and insurance inventory)
- Financial Goals Plan - (Includes executive summary and recommendations in all six areas of financial planning)
- Income Planning & Employee Benefits
 - TPAF Options Analysis
 - Social Security Maximization
 - Pension Maximization
 - How to draw on investments for your lifetime (turn into a paycheck); Withdrawal hierarchy; Tax efficiency
 - Required Minimum Distributions (RMD) Strategies
 - Are you in the confidence zone?
- Insurance and Risk Management
 - Health Insurance Review
 - Life, disability, and other insurances review (needs analysis and review of existing policies)
 - Property and Casualty Review (home, auto, umbrella)*
 - Risk Management (Liability) Analysis
 - What are you afraid of? (Analysis)
- Tax Planning
- Estate Planning
- Investing
 - Roth Conversions, 403b, 457, IRA.
 - Investment Risk Score and Test
 - Asset Allocation Plan

INVEST
From 1.33% annual advisory fee on account balance**

CONSULT
Consultation with Financial Professional

PLAN
Comprehensive Financial Planning

	INVEST	CONSULT	PLAN
	X	X	X
			X
			X
			X
			X
			X
		X	X
		X	X
		X	X
		X	X
		X	X
			X
			X
	X	X	X
	X	X	X
	X	X	X

ONGOING SERVICES

- Accounts Invested in Fee-based Account ** account with access to no load and index funds (no commissions)
- Check In
- Annual Investing or Financial Plan Review
- Ongoing Financial Advice
- Annual Performance Report and Year In Review

	INVEST	CONSULT	PLAN
	X		
	X		X
	X		X
	X		X
	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

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FINANCIAL STRATEGIES

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