

Our Comprehensive Wealth Management Process ...

Developing Your Plan To Reach Financial Independence



Investment Planning

- *Defining “Your Number”*
- *Portfolio Balancing & Asset Allocation*
- *Managing Market Risk*
- *Retirement Income Sufficiency*

Wealth Preservation

- *Income Tax Reduction*
- *Estate Tax Reduction*
- *Wealth Transference*
- *Cash Flow Management*

Adversity Protection

- *Life Insurance*
- *Disability Protection*
- *Liability Protection*
- *Medical Insurance Review*
- *Long Term Health Care Protection*

... in the Context of a Total Wealth Solution ...

Wells Fargo Advisors Financial Network is not a legal or tax advisor.

Insurance products are offered through nonbank insurance agency affiliates of Wells Fargo & Company and are underwritten by unaffiliated insurance companies.

Mitchell Kaufman, CERTIFIED FINANCIAL PLANNER™

Investment products and services offered through Wells Fargo Advisors Financial Network, LLC (WFAFN). Kauffman Wealth Management is a separate entity from WFAFN.

Kauffman Wealth Management is an Independent Firm

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Life well lived.