

Our Comprehensive Wealth Management Process ...

Developing Your Plan To Help 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 ...

Mitchell Kaufman,
Cfp® CFP® "Fk gcvqt." **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

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.

140 S. Lake Ave., Suite 307
Pasadena, CA 91101
(626) 795-6874

550 Periwinkle Lane
Santa Barbara, CA 93108
(805) 969-5444 *(by appointment only)*



Life well lived.