# *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 …*



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