

Investments

Financial Planning

Retirement Income Analysis

A projection of the anticipated income at retirement from all sources, including employee benefits, private plans, investments, insurance and government benefits. Will also make recommendations for how to increase the projected income and offset inflation.

Retirement Plan Distribution Analysis

An evaluation of the distribution alternatives of qualified retirement plans, such as IRA, TSA, 401k, Profit Sharing, Money Purchase Pension, projected to retirement with an illustration of net income after retirement.

Education Funding Analysis

A projection of the costs of education for your children & grandchildren. Will evaluate sources of funding from trusts, family gifts, student grants, student earnings and family contributions, contrasting optional account ownership.

Investment Policy Statement

An analysis of present investment holdings and current asset allocation. This is designed to help you bring current and future holdings into alignment with your personal objectives and retirement circumstances.

Survivor Income Analysis

A review of the total survivor income available from life insurance, employee and government benefits, investments and other sources. We can also help you determine the adequacy of income as well as identify shortages and alternate solutions.

Estate Analysis

A review of family holdings: property, employment interests, insurance, inheritance, ownership interests and current legal documents. We'll also assist you in the calculation of settlement expenses and taxes.