

mainstreet

FINANCIAL PLANNING

Navigation Support SILVER Service



ORGANIZE & UPDATE

- Goals/Milestones Review
- Financial Self Satisfaction Discussion
- Tackle Roadblocks
- Financial Statement Update
- Portfolio Assessment
- Create Action Items



REVIEW & PLAN

- Money Roadmap Review
- Goals/Milestones Review
- Financial Statement Update
- Spending Plan Review
- Insurance Review
- Portfolio Assessment
- Create Action Items

OPTIONAL: TAX PREPARATION AND PLANNING

Topics covered:

RMDs, debt, taxes, home maintenance

Examples of topics covered: cashflow, debt, taxes, home maintenance, transitions, retirement planning, college savings, financing for big purchases, insurance coverages, health concerns, emergency fund, estate plan review & discussion, portfolio withdrawal strategies and rebalance recommendations, RMD's, Roth conversions, tax deductions, capital gains/losses, charitable gifting, social security, Medicare, student loans, real estate, ect.

