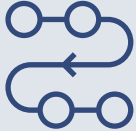




## Financial Independence Advisors

We help cover the many aspects of your financial well-being.

### Our Process



Our Process is the monitoring strategy we use to help cover the many aspects of your financial well-being throughout the year. We've designed this strategy to comprehensively review your financial health during applicable times of the year and in a manageable work flow. With this process we can leverage trusted resources of our own, as needed, or existing professional relationships you've already established.



JANUARY – MARCH

#### Investment & Financial Planning

Cash Flow Analysis • Review of Debts  
Create Goals • Review Progress of Goals  
Review Risk Tolerance  
Asset Allocation Review  
Diversification of Assets • Stock Options



APRIL – JUNE

#### Estate & Legacy Planning

Establish Will, Power of Attorney, Health Care Proxy  
Trust Considerations (Revocable & Irrevocable)  
Gifting Strategies  
Review Current Estate Documents



JULY – SEPTEMBER

#### Risk Management & Asset Protection

Health Insurance • Dental & Vision Insurance  
Short-Term & Long-Term Disability Insurance  
Long-Term Care Insurance • Life Insurance  
Property & Casualty Insurance  
Review Company Benefits • Review Risk Tolerance



OCTOBER – DECEMBER

#### Tax & Income Planning

Review W2 or 1099 • Review Prior Year Return  
Determine Saving Location(s)  
Contribution(s) Discussion • Estate Taxes  
Gift Taxes • Probate

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