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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