

# Duncan Advisor Resources

## Financial Planning

### Value of our Subscription Process

Tried, tested, and thriving, we've taken our practice at Duncan Financial Group to a new level by incorporating Financial Planning in our client engagement process. Clients and prospects are looking for a financial quarterback to understand their picture holistically and provide them with recommendations and guidance for a coordinated, successful future. There's arguably no better way to deliver on this than a Financial Plan delivered by a team of experts – **let us help you take your practice to a new level.** While each Client is different based on their specific goals, objectives, and needs, our process includes understanding, evaluation and development as needed of the following:

- Growing Wealth / Accumulating Assets
  - » Potential risk associated with outliving assets and retirement income gaps
  - » Identification of projected retirement surplus or shortfall
  - » Testing against future market conditions using a Monte Carlo Analysis
  - » Coordination of Qualified and Non-Qualified assets for optimal income formulation
  - » Social Security Optimization and Retirement Income Planning
  - » Tax Saving and Tax Efficient Distribution Strategies
- Leveraging Wealth / Investment Management
  - » Investment Policy Statement with Portfolio Selection and Monitoring
  - » Portfolio construction and evaluation integrated with tax and estate needs
- Protecting Wealth / Risk Management
  - » Long Term Care Funding Strategies
  - » Disability Insurance
  - » Umbrella Liability Strategies
  - » Life Insurance Planning
  - » Property and Casualty Insurance
  - » Annual Policy Review
  - » Integration with first-class life Brokerage team to develop tailored solutions
- Transferring Wealth / Estate Planning
  - » Wealth Transfer, Legacy Planning, Charitable Giving & Tax Strategies to coordinate a comprehensive estate plan
  - » Review of existing documents and beneficiaries
  - » Coordination with Attorney to seamlessly implement solutions
- Business Owner Planning
  - » Evaluation of qualified plan and other vehicles
  - » Executive Benefit Strategies (i.e. Deferred Compensation)
  - » Analysis of diversifying assets and reinvesting in the business
  - » Business Succession Planning, coordination with Attorney

All Financial Plans receive the following added benefits:

- » Coordination with CPA, Estate Attorney and Other Professional Advisors
- » Help with establishing a Personal Client Website for Account Aggregation, Online Vault and Collaboration

