What is Comprehensive Wealth Management?

Making It All Work Together...

Retirement Planning	Cash Flow & Budget	Investment Planning	Insurance Planning	Tax Planning	Estate Planning	Legacy Planning
Retirement Goal Setting	Setting Goals Expenses & Budgeting	Account Aggregation	Review of Existing Policies	Tax Aware Investing	Wills	Gifting
Bucket List Items	Planned Large Expenses	Review of Portfolio	Life Insurance Needs Analysis	Review of Cost-Basis	Power of Attorney	College Planning
Cash Flow Analysis	Emergency Funding	Asset Allocation	Long Term Care Insurance Analysis	Review Realized Gains	Living Will	529 College Savings Plans
Social Security Analysis	Review of Income Sources	Stock Concentration	Disability Insurance Analysis	Carry Forward Losses	Health Care Proxy	UGMA/UTMA
IRA Contributions &Roth Conversions	Dollar Cost Averaging	Risk Analysis	Health Insurance Review	Tax Loss Harvesting	Trusts	Roth IRA's for Children
Annuities & Pensions	Debt Management	Time Horizon Planning	Home, Renter's, Auto & Umbrella Review	Deductions & Credits	Irrevocable Life Insurance Trusts	Establishing Trusts
RMD's & Withdrawal Strategies	Mortgage Review	Withdrawal Strategies	Liability Coverage	Potentail Roth Conversions	Estate Tax Planning	Successor Trustee
Review of Employer-Sponsored Plans	Lines of Credit	Monitoring of Outside Accounts such as 401(k), etc.	Health Savings Accounts	Health Savings & Flexible Spending Accounts	Guardians for Minor Children	Caring for Elderly
Self-Employed Plans			Medicare Advice	Tax Return Preparation & Review	Charities	
					Beneficiary Review	

In addition to our services listed above, we also:

» Coordinate with other advisors such as your attorneys and accountants.

» Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.

» Hold regular meetings and ensure that all planning is well coordinated and implemented.

» Coordinate family legacy meetings to facilitate communication and understanding of legacy goals

Duncan FINANCIAL GROUP

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