



Next Generation Service Offerings

CORE WORK

- Financial Planning Elements
 - Build Net Worth statement
 - Discuss Assumptions and Future Goals for Retirement
 - Annual Review and Benchmarking of Progress to Goal

- 401(k) Plan Guidance
 - Review Current Allocation and Funding
 - Annual Review and Rebalance
 - Rollover Guidance when Job Changes Occur

ADDITIONAL SERVICE

- Mortgage and Refinancing Analysis

- Insurance Review (Needs Analysis and the Right Type)

- Basic Estate Planning for Wills, Power of Attorneys and Trusts

- College Funding Guidance and Account Assistance

- Tax Coordination with Your Professional



WEALTH PLANNING
CORPORATION