



GENESIS PLANNING

FOR YOUNG PROFESSIONALS

*A Confident Future Requires Careful
Planning Today*

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Financial Planning Engagement

Fee includes a comprehensive financial plan covering the six areas of need below with multiple one-on-one planning meetings, specific recommendations, and a presentation of findings with direct actionable instructions and timelines. Also included is continued client access to MoneyGuidePro®, an interactive financial planning software program.

◆ Cash Flow Planning and Debt Management

- Review current monthly and annual income and expenses
- Review current savings and debt management strategy
- Create cash flow plan for current expenses, debt repayment and savings

◆ Financial Plan Projection

- Create and define short & long term goals for the future
- Identify financial concerns and tolerance for investment risk
- Project future spending and savings to determine probability of reaching future goals
- Provide prioritized action plan checklist to work toward goals

◆ Retirement & Investment Account Analysis (Up to 4 Accounts)

Review 401(k) & IRA retirement and investment accounts including:

- Roth vs. Traditional
- Current asset allocation
- Investment options
- Rebalancing and funding recommendations

◆ Insurance Analysis

- Review all group and individual life and disability insurance coverage
- Analyze insurance needs relating to risk in event of unexpected death or disability

◆ Estate Plan Review

- Review current estate plan documents
- Review current titling and beneficiary designations on all insurance policies and retirement accounts for consistency with estate plan

◆ Investment Related Tax Planning

- Tax considerations with regards to investment planning
- Review Flex Savings – HSA contributions

OPTIONAL PLANNING SERVICES

Subject to additional fees:

- Education Savings Planning
- Employee Benefits Review
- Philanthropic Giving Strategies
- Purposeful & Multi-Generational Gifting
- Advanced Insurance Strategies
- Stock Option /Restricted Stock Review
- Asset Management Strategies
- Business Tax Planning Assistance