Genesis Planning

FOR YOUNG PROFESSIONALS

A Confident Future Requires Careful Planning Today

1707 N. Randall Road Suite 200, Elgin, IL 60123
(847) 888-8600

200 W. Adams Street, Suite 2015, Chicago, IL 60606
(847) 888-8600

202 N. Rhodes Avenue, Suite 102, Sarasota, FL 34237
(941) 951-1249

www.muellerfinancialsolutions.com

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FINANCIAL SERVICES

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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

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