Trustworthy FINANCIAL

How We Can Help

Name: ______________________ **Phone:** ______________________

Address: ______________________

Email: ______________________

PLEASE CHECK ANY TOPICS YOU MAY WANT TO REVIEW WITH OUR TEAM:

Our Goal Is To Make Sure Every Part of Your Plan Works Together.

Medicare Coverage Options

- ***Medicare Advantage***
- ***Medicare Supplements***
- ***Prescription Drug Plans***

Additional Protection Options

- ***Dental/Vision/Hearing***
- ***Hospital Indemnity Plans***
- ***Cancer Coverage***
- ***Critical Illness Coverage***
- ***Long-Term Care Planning***

Life Insurance Options

- ***Final Expense***
- ***Term Life***
- ***Permanent Life (Whole & IUL)***

Do You Currently Have Life Insurance in Place?

☐ *Yes* ☐ *No* ☐ *Don't Know*

Retirement and Income Planning

- ***Income Planning***
- ***Market Safe Strategies***
- ***Proactive Tax Planning***
- ***Estate Planning***

Would You Like To Review How Medicare Costs Fit Into Your Retirement Plan? ☐ *Yes* ☐ *No*

Debt Elimination

How Would Your Financial Picture Change if You Were 100% Debt-Free?

Are You Currently Paying Extra on Your Debts Every Single Month?

Would You Like To Schedule a Debt Elimination Consultation? ☐ *Yes* ☐ *No*

Helping Individuals, Families and Business Owners Secure Their Future and the Future of Their Loved Ones

David Williams, Medicare Director

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QUICK RETIREMENT ASSESSMENT

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Income	Do you have a retirement income plan that guarantees you won't run out of money?	**YES** or **NO**	Our team builds customized income plans that allow you to live out your best retirement!
Market Safe Plan	Do you have a plan to protect yourself from the next big market downturn?	**YES** or **NO**	Our team has tools and strategies that create safe, strong, and predictable growth while avoiding the next market downturn.
Proactive Tax Plan	Do you have a proactive tax plan for your retirement accounts?	**YES** or **NO**	Our team implements a proactive tax planning approach that allows you to keep more for you and your family and less for Uncle Sam.
Asset Protection & Estate Planning	Do you have an estate plan to insure you avoid unnecessary probate fees and taxes?	**YES** or **NO**	Our team helps you evaluate the best estate planning tools possible to make sure you are leaving a legacy and not a mess for your loved ones.
Care Plan – Health & Long-Term Care	Do you have a plan to protect your family and your assets from the rising costs of long-term care?	**YES** or **NO**	Our team reviews and implements strategies to safeguard your retirement nest-egg from the most dangerous threat which are the costs related to Long-Term Care.
Transparent & Low Investment Fees	Do you know how much your investment fees are costing you per year or over the course of your retirement?	**YES** or **NO**	Our team not only brings visibility to those costs, but they make sure that the fees and costs that are paid are on a flat fee basis and are aligned with the services and value delivered.

SCAN TO SCHEDULE

If you answered NO to one or more... Schedule Your Free On-Track Retirement Review today!

Join us for a **Virtual Complimentary Comprehensive Retirement Overview** on **Zoom**, offering personalized financial insights from the comfort of your home. We will help you navigate your financial landscape, addressing tax, investment, and retirement plans.