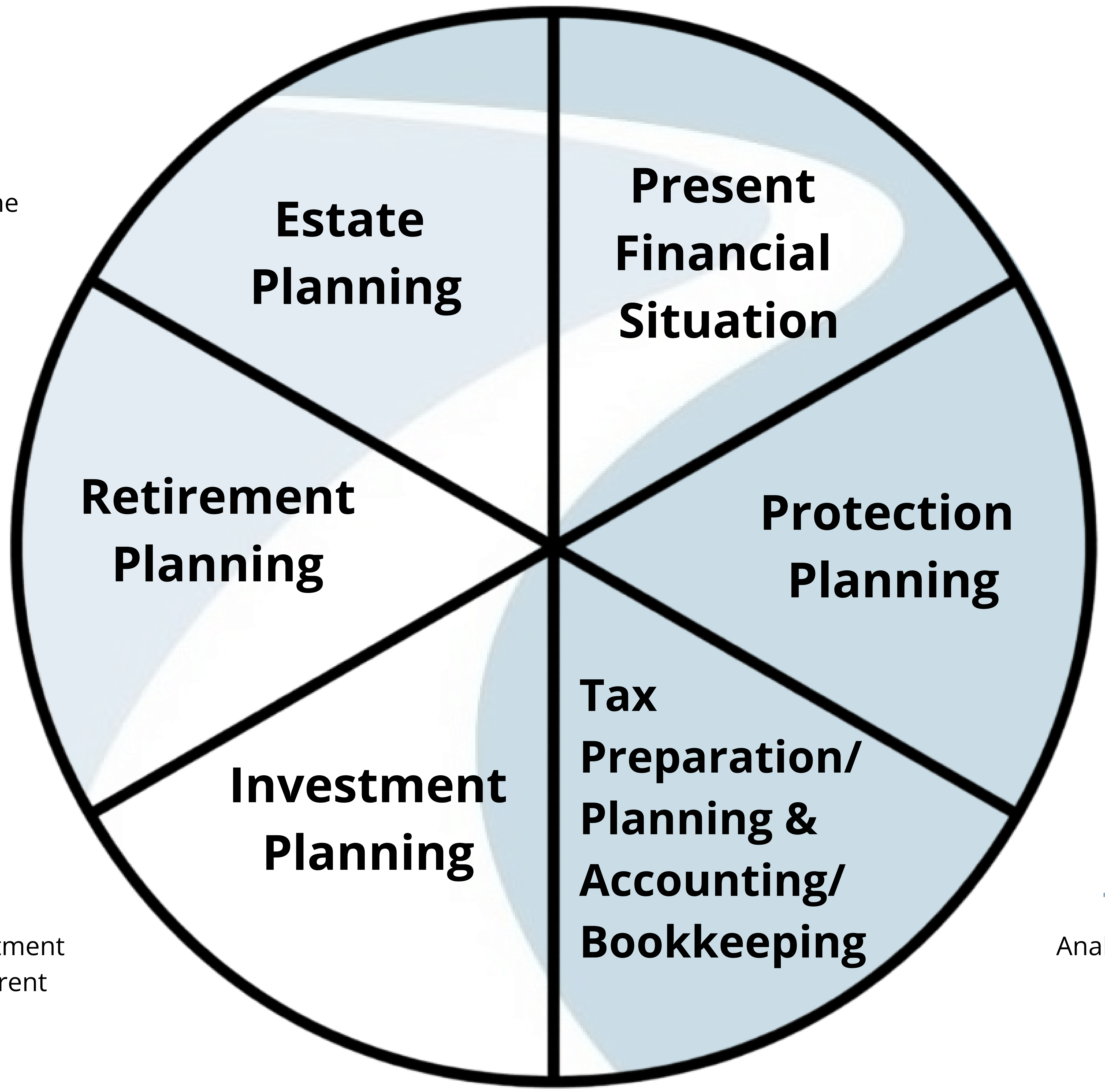
Pathway Financial Design

6 Areas of Financial Planning



ESTATE PLANNING

Educating on how assets pass and the documents that are recommended for a proper estate plan, reviewing current estate plan to help ensure it is consistent with wishes, and completing the implementation of beneficiaries to ensure consistent with the will and Living Trust

RETIREMENT PLANNING

Defining retirement goals/needs, evaluating current position, and adjusting variables in an effort to help ensure the success of the plan.

INVESTMENT PLANNING

Reviewing the existing structure of investment accounts and the appropriateness of current investment tools and making recommendations to help ensure the structure and tools are consistent with retirement needs risk tolerance and personal tax situation.

PRESENT FINANCIAL POSITION

Organizing assets and liabilities into a format that allows for monitoring of progress and establishing, when necessary, a spending plan that if followed will help pursue financial goals and work towards financial assurance.

PROTECTION PLANNING

Reviewing finaincial risk and how they are managed to help ensure it is consistent with Net Worth and need. Often entails a complete insurance review.

TAX PREPARATION/PLANNING

Analyzes current tax situation and determines opportunities to help optimize situation considering all areas of your financial life.

ACCOUNTING/BOOKKEEPING

Organize and maintain you business books and records for optional growth and planning.