volare
Wealth Advisors

Comprehensive Service Platform

FINANCIAL PLANNING

+ Organize finances and cash flow management
+ Identify and plan for life goals
+ Saving needs to fund lifestyle
+ Implement customized strategic plan
+ Ongoing risk management
+ Charitable giving
+ Multi-generational wealth transfer
+ Consult on mortgage refinancing
+ Consult with commercial and personal financing lenders
+ Planning for employee stock options
+ Review of employee benefits
+ Bank lending including line of credit & collateralized loan analysis

INVESTMENTS

+ Quantify investment objectives
+ Asset allocation strategies and rebalancing
+ Consolidated performance reporting
+ Investment manager evaluation and research
+ Retirement and non-retirement account allocation
+ Access to Bluemonte, our institutional-caliber personalized investment platform

FETCH! CLIENT PORTAL

+ Real time access to net worth, goals, financial plan via customized and interactive mobile-friendly client portal Fetch Financial Life Hub that aggregates all clients' information including assets not managed by advisor
+ Vault for organization of important documents

TAX

+ Tax planning by advising on taxes incurred when clients buy and sell assets
+ Advise on account type (IRA, ROTH, 529)
+ Advise on the timing of social security benefits

INSURANCE

+ Discuss and manage longevity risk and long-term care
+ Evaluate appropriate life, disability and long-term care coverage

EDUCATION

+ Educational events featuring RFG Advisory's Chief Investment Officer Rick Wedell
+ Timely on-demand market commentary content
+ StrongHER Money events focused on helping women live financially fearless

TRUST & ESTATE

+ Trust company or trustee selection
+ Coordinate communication with attorneys and CPAs
+ Estate planning
+ Lifetime gifting strategies
+ Advise on Titling of Assets

BUSINESS CONSULTING

+ Succession planning
+ Advise on mergers and acquisition opportunities
+ Advise on family business dynamics and sale of family business

YOUR TOP PRIORITIES

+ ______________________________
+ ______________________________
+ ______________________________

Let's Soar

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ITEMS TO BE DISCUSSED:

SPECIAL NOTES