ELLIS & COMPANY
RETIREMENT STRATEGISTS

Our Services

FINANCIAL PLANNING

- Planning Financial Needs Analysis
- Strategic Allocation of Assets
- Portfolio Construction
- Investment Selection

- Cash Flow Analysis
- Income Assessment & Construction
- Pension Evaluation & Advice

- Distribution Strategies
  - Withdraw Prioritization
  - Required Minimum Distributions (RMD)
- Human Capital Evaluation

- Social Security Evaluation & Advice
- Complete Cost Analysis & Communication
- Education Expense Planning

RISK EVALUATION

- Emergency Readiness Assessment
- Concentration Evaluation
- Personalized Investment Policy Statement

- Insurance Planning & Evaluation
  - Life Insurance
  - Long Term Care
  - Key Person Insurance
  - Disability Insurance

- Assets to Goals Alignment
- Debt Assessment
- Longevity Risk Evaluation
- Interest Rate Risk Sensitivity Assessment

- Investment Analysis
  - Long-term Goal Focus
  - Short-term Risk Assessment
- Security Evaluation, Selection, & Monitoring
- Holding Concentration Evaluation

TAX EFFICIENCY

- Tax Efficiency Maximization Planning
- Coordination with CPA/tax preparer
- Wealth Transfer Strategies

- Qualified Charitable Donations
- Capital Gains/Tax Loss Harvesting Evaluation

- Estate Planning
- Trust & Legacy Planning
- Charitable Planning Strategies
- Retirement Contribution Evaluation

LEGACY PLANNING

- Beneficiary Review
- Will, Living Will, Trust... etc. Evaluation
- Attorney Coordination

- Survivor Needs Assessment
- Power of Attorney Advice

- Surviving Spouse Income Analysis & Planning
- Sudden Wealth Planning

LEARN MORE

www.retireconfident.com

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