

# Financial Planning Process

-  **1. Assess Portfolio Risk**
-  **2. Fee Analysis**
-  **3. Tax Review**
-  **4. Income Plan**
-  **5. Social Security Maximizer**
-  **6. Life & Long Term Care Review**
-  **7. Estate Planning**

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## Considerations



Risk



Cost



Taxes



Cash Flow



Legacy



**WEALTH  
MANAGEMENT**  
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