The FINANCIAL STRATEGIES GROUP Inc.

11400 Rockville Pike, Suite 500
Rockville, MD 20852
(301) 984-4461

Financial Planning Modules

Investment Planning	Estate Planning	Retirement Planning	Insurance Planning	Cash Flow and Budget	Assistance to Loved Ones	Tax Planning
☐ Review of Portfolio	☐ Wills	☐ Retirement Goal Setting	☐ Review of Existing Policies	☐ Review of Income Sources	☐ Gifting	☐ Tax Sensitive Investing
☐ Asset Allocation	☐ Power of Attorney	☐ Social Security Analysis	☐ Life Insurance Needs Analysis	☐ Expenses and Budgeting	☐ College Planning	☐ Review of Cost Basis
☐ Time Horizon Planning	☐ Living Will	☐ Cash Flow Planning	☐ Long Term Care Insurance Analysis	☐ Debt Management	☐ Caring for Elderly	☐ Review Realized Gains
☐ Distribution Strategies	☐ Health Care Proxy	☐ IRA, ROTH Contributions	☐ Disability Insurance Analysis	☐ Review One-Time Expenses	☐ 529 College Savings Plans	☐ Carry Forward Losses
☐ Account Aggregation	☐ Trusts	☐ ROTH Conversions	☐ Health Insurance Review	☐ Planned Large Expenses	☐ ROTH IRA's for Children	☐ Tax Loss Harvesting
☐ Monitor Outside Accounts e.g. 401(K), etc.	☐ Irrevocable Life Insurance Trusts	☐ Employer-Sponsored Plans	☐ Homeowner's or Renter's Insurance	☐ Emergency Funding	☐ UGMA / UTMA	☐ Deductions and Credits
☐ Investment Policy Statement	☐ Estate Taxes	☐ Annuities and Pensions	☐ Liability Coverage	☐ Dollar Cost Averaging	☐ Establishing Trusts	☐ Potential ROTH Conversions
☐ Stock Concentration	☐ Guardians for Minor Children	☐ RMD Strategies	☐ Health Savings Accounts	☐ Mortgages		☐ Health Savings and Flexible Spending Accounts
	☐ Charities	☐ Self-Employed Plans	☐ Medicare Advice	☐ Lines of Credit		☐ Tax Return Review
		☐ Bucket List Items				

- **We coordinate with other advisors such as your attorneys and accountants.**
- **We communicate with you regularly to ensure that your plan is implemented smoothly and you are on track to achieve your goals.**
- **We maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.**