Ways Advisors Can Add Value

fpPATHFINDER

Categories	Topics	Guide Suggestions
Cash Flow Management	- Buy vs Lease New Vehicle Analysis - Budget + Cash Flow Review - Goals Savings Strategy Review	- Should I Lease Or Buy My Next Automobile? - What Issues Should I Consider When Reviewing Cash Flow? - What Accounts Should I Consider if I Want To Save More?
Insurance Planning	- Health + Life Insurance Review - Early Retirement Health Care Analysis - Long-Term Case Analysis	- What Issues Should I Consider When Reviewing My Health And Life Insurance Policies? - If I Retire Early, Should I Buy Health Insurance Through The Health Insurance Marketplace? - What Issues Should I Consider When Purchasing Long-Term Care Insurance?
Investment Planning	- Incentive Stock Option Analysis - Investment Property Review - Investment Account Deep Dive	- What Issues Should I Consider Regarding My Incentive Stock Options? - What Issues Should I Consider When Owning A Rental Property? - What Issues Should I Consider When Reviewing My Investments?
Tax Planning	- Tax Loss Harvesting Analysis - Sale of Business Tax Analysis - Investment Tax Review	- What Issues Should I Consider When Harvesting Capital Losses? - What Issues Should I Consider When Planning For The Sale, Disposition, Or Succession Of My Business? - Will I Have To Pay Tax On The Sale Of My Investment
Retirement Planning	- Social Security Benefits Review - Retirement Planning Review - Pension Lump Sum vs Annuity Analysis	- What Issues Should I Consider With My Social Security Retirement Benefits? - What Issues Should I Consider Before I Retire? - Should I Take My Pension As A Lump Sum?
Estate Planning	- Windfall Analysis - Loss of Spouse Review - Estate Planning Considerations	- What Issues Should I Consider If I Experience A Sudden Wealth Event? - What Issues Should I Consider If My Spouse Passed Away? - What Issues Should I Consider When Reviewing My Estate Planning Documents?