

# Financial Planning



Enhance your financial well-being with comprehensive financial planning service through Kinnect Advisors, now with Legal Resources.



## KINNECT ADVISORS: EXPERT FINANCIAL PLANNING, COVERED BY YOUR LEGAL PLAN



### Financial Plan

Receive a comprehensive financial plan tailored to your unique goals and circumstances.



### Financial Advisor

Enjoy virtual consultations and continuous support from your personal financial advisor.



### Goal Tracking Platform

Pursue your financial goals with personalized insights and recommendations.

## INCLUDED SERVICES

### Investment Planning

- ✓ Audit your current portfolios and objectives
- ✓ Design an asset-allocation strategy
- ✓ Implement individualized investment strategies
- ✓ Access to non-proprietary investments across all asset classes

### Protection Planning

- ✓ Life, health and disability Insurance review and implementation
- ✓ Long-Term Care Planning
- ✓ Property & Casualty insurance audit and placement
- ✓ Medicaid, Medicare and Special Needs Planning

### Retirement Planning

- ✓ Design a retirement income strategy
- ✓ Maximize Social Security Income
- ✓ Simulate multiple retirement scenarios and take action
- ✓ IRA rollovers, Roth conversions and RMD Planning

### Estate & Tax Planning

- ✓ Income Tax Planning
- ✓ Tax loss harvesting
- ✓ Tax reduction planning
- ✓ Wills, trusts, and estate tax planning
- ✓ Beneficiary and legacy planning
- ✓ Business and Succession planning

## READY TO GET STARTED?

**Call 1-800-728-5768 or email [financialservices@kinnectadvisors.com](mailto:financialservices@kinnectadvisors.com) to start your financial wellness journey today!**

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