

# FlahertyColvin

## Financial Management Services Offered

- Life Style Planning
- Distribution of Assets
- Portfolio Review
- Asset Allocation Analysis
- Sector Exposure
- Stock and Mutual Fund Research
- Performance Analysis
- Account Maintenance
- Account Monitoring
- Cost Basis Accounting
- Client Education Seminars
- Company 401(k) Monitoring
- Tax Efficiency of Portfolio
- Budget Analysis
- Estate Planning Analysis
  - Trusts
  - Special Needs Trust
  - Wills
  - Buy/Sell Agreements
  - Tax Planning
- Retirement Planning
  - IRA
  - ROTH IRA
  - SEP IRA
  - Simple IRA
  - 401(k)
  - Profit Sharing Plans
  - Individual K
  - 403B
- College Planning
  - College Savings 529 Plans
  - Uniform Transfer to Minor
  - Education IRA
- Insurance
  - Life Insurance
  - Long Term Care Insurance
  - Health Insurance
- Small Business Planning
  - Business Development Plans
  - Cash Flow Analysis
  - Business Valuations
  - Company Retirement Plans
  - Insurance