



FINANCIAL HOUSE

Build from the foundation up!



Brokerage Account

College Planning /
Family Funding

Retirement & Future
Income Planning

Emergency Savings /
Paying Off Debt

Health Insurance / Disability Insurance / Long Term Care /
Life Insurance

When we think about Financial Planning and the way we should structure a plan, it is important to build in a similar way to a house. Just like all new homes, the most important step is to start with a solid foundation for a solid future. Without a sturdy foundation, your entire home could be at risk! In a Financial Plan, if you don't have proper insurance in place then you run the risk of dipping into your other investments accounts or plan strategies causing you to potentially be detoured from your goals. Life happens to us all, make sure you have taken the proper precautionary steps for when disaster strikes!