

Financial Management

I M A G E L I S T

- | | |
|--|---|
| 0010 Welcome | 0290 Potential Tax Savings on Contributions to a Traditional IRA |
| 0020 Our Commitment | 0300 Benefits of Employer-Sponsored Retirement Plans |
| 0030 Workbook and Evaluation Form | 0310 Save for Retirement |
| 0040 Six Steps to Financial Success | 0320 Will the Smiths Have Enough to Retire? |
| 0050 Protect What You Have | 0330 The Smiths' Sources of Income |
| 0060 Key Areas of Insurance Coverage | 0340 The Smiths' Projected Monthly Income |
| 0070 Health Insurance Marketplace | 0350 The Smiths' Retirement Income Shortfall |
| 0080 Three Critical Life Insurance Questions | 0360 Developing an Effective Retirement Plan |
| 0090 How Much Life Insurance Do You Need? | 0370 How Much Will You Need to Retire? |
| 0100 Take Control of Your Cash Flow | 0380 Leave a Legacy |
| 0110 Cash Management Process | 0390 Probate |
| 0120 Traditional Savings Vehicles | 0400 Federal Estate Taxes |
| 0130 The \$160,000 Credit Card | 0410 Long-Term Care |
| 0140 Invest Wisely | 0420 The Cost of Long-Term Care |
| 0150 Mr. and Mrs. Taylor | 0430 Estate Distribution Techniques |
| 0160 Mr. and Mrs. Taylor | 0440 Trust Strategies |
| 0170 Lessons Learned | 0450 Additional Estate Documents |
| 0180 Mutual Funds and Exchange-Traded Funds | 0460 Putting Your Knowledge to Work |
| 0190 Why Do People Invest in Mutual Funds and ETFs? | 0470 Evaluation Form and Complimentary Consultation |
| 0200 Types of Funds | 0480 Thank You |
| 0210 Manage Your Taxes | |
| 0220 Taxes Are Not Equal | |
| 0230 Form 1040 | |
| 0240 Why Pay Taxes on Income You Aren't Using? | |
| 0250 Investment Taxes to Consider | |
| 0260 Tax-Favored Investments | |
| 0270 Is Tax-Exempt Investing Appropriate? | |
| 0280 Advantages of Tax-Deferred Growth | |