

Your Financial “Big Picture”

The grid below details the components of a comprehensive financial strategy—the “big picture” of financial success.

FINANCIAL PLANNING

Investment Planning	Estate Planning	Retirement Planning	Insurance and Risk Management	Cash Flow and Budget	Assistance to Loved Ones	Income Tax
<ul style="list-style-type: none">» Portfolio Review» Asset Allocation» Long-Term» Intermediate» Short-Term» Investment Policy» Withdrawal Policy» Other Assets	<ul style="list-style-type: none">» Wills» Living Will» Trusts» Heirs» Power of Attorney» Health Care Proxy» Irrevocable Life Insurance Trusts» Estate Taxes» Guardians for Minor Children» Charitable Giving	<ul style="list-style-type: none">» Retirement Goals» Investments» Annuities» IRAs» Employer Sponsored Plans» Social Security and Medicare» Pension Plans» RMDs & Withdrawal Strategies» Business Planning» Self-Employed Retirement Plans	<ul style="list-style-type: none">» Review of Existing Policies» Life Insurance» Long Term Care/Disability» Asset Protection» Liability» Health» Homeowner’s or Renter’s	<ul style="list-style-type: none">» Income Sources» Expenses and Budgeting» Debt Management» One-Time Expenses» Planned Large Expenses» Emergency Fund» Mortgage Review» Lines of Credit	<ul style="list-style-type: none">» Gifting» Education Planning» Caring for Elderly» 529 Savings Plans» Roth IRAs for Children» UGMA/UTMA	<ul style="list-style-type: none">» Review of Cost-Basis» Review Realized Gains» Carry Over Losses» Tax Loss Harvesting» Deductions and Credits» Potential Roth Conversions» Health Savings & Flexible Spending Accounts

There is no assurance that the techniques and strategies shown are suitable for all investors or will yield positive outcomes. The purchase of certain securities may be required to effect some of the strategies. Investing involves risks including possible loss of principal. Tax or legal services are not offered through, or supervised by, The Lincoln Investment Companies.



Kimberly F Myers, CRC®

Financial Advisor

928-499-8599

kmyers@lincolninvestment.com

Copper Sun Financial, LLC

4425 E Agave Rd Ste 122, Phoenix, AZ 85044

19756 N John Wayne Pkwy #100, Maricopa, AZ 85139

www.coppersunaz.com

hablo espanol

Advisory services offered through Capital Analysts or Lincoln Investment, Registered Investment Advisers.

Securities offered through Lincoln Investment, Broker-Dealer, Member FINRA/SIPC.
www.lincolninvestment.com

There is no assurance that the techniques and strategies shown are suitable for all investors or will yield positive outcomes. The purchase of certain securities may be required to effect some of the strategies. Investing involves risks including possible loss of principal. Tax, legal, Social Security claiming and Medicare services are not offered through, or supervised by, The Lincoln Investment Companies.