



Menu of Services

SUKO FINANCIAL GROUP

Foundational Planning Services

Services Offered:

Risk Management

- Insurance Audit & Planning
- Debt Management Strategies
- Executive Summary w/ Objectives
- Liquidity Planning
- Risk Analysis

Key Objectives & Growth Planning

- Personal Financial Statement
- Cash Flow Planning
- Qualitative & Quantitative Goal Planning
- Budgeting

Legacy Planning

- Distribution Strategies
- Estate Planning

Established Planning Services

Services Offered:

All Foundational Planning, Plus:

Risk Management

- Asset Management
- Key Info Review

Tax Management

- Tax Return Review
- Distribution Planning

Key Objectives & Growth Planning

- Goal Planning w/ Probability Analysis
- Investment Philosophy Planning
- Risk Diversification Strategies
- Employee Benefits Strategies

Legacy Planning

- Estate Transition Planning
- Health Insurance Cost Planning
- Lifetime Income Planning

High Complexity Planning Services

Services Offered:

All Established Planning Services, Plus:

Risk Management

- Buy/Sell Analysis
- Credit Score Audit

Tax Management

- Estate Review

Key Objectives & Growth Planning

- Executive Summary w/ Objectives
- Social Security Management
- Special Needs Planning
- Divorce Financial Planning

Legacy Planning

- Charitable Gift Planning
- Medicaid

John Sukovaty, AIF® does not offer tax or legal services. Please consult a tax and/or legal professional regarding your personal situation.