



## RAYMOND JAMES

KIEL VANDERVEEN, CFP®  
COLE SHARP, CFP®

## WEALTH MANAGEMENT

- ✓ Attorney Coordination
- ✓ Gift Planning
- ✓ Trust Integration
- ✓ Charitable Giving Tax Strategies
- ✓ Medicare/Health Care Assistance
- ✓ Private Banking\*

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation Strategies
- ✓ Distribution Strategies
- ✓ Education Funding Strategies
- ✓ Survivor Needs/Life Ins. Analysis
- ✓ Disability Coverage Analysis
- ✓ Long-Term Care Planning
- ✓ Estate Planning Summary
- ✓ Social Security Planning

- ✓ Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Quarterly Contact

## FINANCIAL PLANNING

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation Strategies
- ✓ Distribution Strategies
- ✓ Education Funding Strategies
- ✓ Survivor Needs/Life Ins. Analysis
- ✓ Disability Coverage Analysis
- ✓ Long-Term Care Planning
- ✓ Estate Planning Summary
- ✓ Social Security Planning

- ✓ Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Semi Annual Meeting

## CORE INVESTMENT MANAGEMENT

- ✓ Basic Goal Planning and Monitoring
- ✓ Risk Tolerance
- ✓ Asset Allocation
- ✓ Portfolio Performance
- ✓ Annual Meeting

The services listed are provided for illustrative purposes only to show the types of services available. Not all individuals would need every service. The specific services offered would be outlined in the applicable account services agreement. Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional. Investment advisory services offered through Raymond James Financial Services Advisors, Inc. BluePrint Financial Planning is not a registered broker/dealer and is independent of Raymond James Financial Services. Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER AND CFP® in the U.S. \*Bank and Lending Services provided by Raymond James Bank, member FDIC, affiliated with Raymond James Financial Services and Raymond James & Associates, Inc.