BluePrint
FINANCIAL PLANNING
MORE THAN JUST INVESTING
KIEL VANDERVEEN, CFP®

CORE INVESTMENT MANAGEMENT

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

FINANCIAL PLANNING

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation
- ✓ 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

WEALTH MANAGEMENT

- ✓ Attorney Coordination
- ✓ Insurance Agent Coordination
- ✓ Gift Planning
- ✓ Trust Integration
- ✓ Charitable Giving Tax Strategies
- ✓ Medicare/Health Care Assistance
- ✓ Document Storage

- ✓ CPA Coordination
- ✓ Retirement Needs
- ✓ Tax Mitigation
- ✓ 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

All financial planning and wealth management services are provided as needed.

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