INSPIRED FINANCIAL

Our Wealth Management Services

Investment Planning

- Review of Portfolio
- Asset Allocation
- Determine Time Horizon
- Withdrawal Strategies
- Customized Investment Policy Statement
- Concentrated Stock Positions
- Monitor Investments Held Outside of the Firm
- Research Alternative Investment Strategies

Income Tax Planning

- Tax Mitigation Strategies
- Tax Loss Harvesting
- Review of Cost Basis
- Leverage Capital Gains
- Tax Loss Carry Forwards
- Deductions & Credits
- Roth Conversion Strategies
- Health Savings & Flexible Spending Accounts
- Charitable Giving Strategies

Retirement Planning

- Retirement Goal Setting
- Social Security & Medicare Optimization
- IRA Contributions and Conversions
- Employer-Sponsored Plans & 401(k)s
- RMD and Withdrawal Strategies
- Business Planning
- Self-Employed Retirement Plans

Estate Planning & Charitable Giving

- Prepare Estate Planning Roadmap
- Trusts
- Wills
- Power of Attorney
- Healthcare Proxy
- Living Will
- Irrevocable Life Insurance Trusts
- Estate Taxes
- Guardians for Minor Children
- Charitable Trusts
- Family Legacy Meeting

5011 Argosy Avenue, Suite 7, Huntington Beach, CA 92649 | 714.971.0663 | info@InspiredFinancial.biz | www.InspiredFinancial.biz

Our Wealth Management Services (cont'd)

Risk Management & Insurance

- Review of Existing Policies
- Life Insurance Needs
- Long Term Care Insurance
- Disability Insurance
- Health Insurance
- Personal Liability Insurance
- Homeowner's or Renter's Insurance
- Specialty Risk Assessment

Cash Flow, Debt & Budget

- Income Sources
- Expenses & Budgeting
- Debt Management
- Planned Large Expenses
- One-Time Expenses
- Emergency Funding
- Mortgage Review
- Lines of Credit

Assistance to Loved Ones

- Gifting
- Education Planning
- College Savings & 529 Plans
- Caring for Elderly
- Roth IRAs for Children
- UGMA/UTMA

Concierge Services

- Collaboration with other advisors such as attorneys and accountants
- Annual client communication strategy customized to your needs
- Secure, online document storage for ease of access & disaster recovery
- Specialized services for transitions such as divorce or loss of a spouse