Financial Planning

Enhance your financial well-being with our comprehensive financial planning service, now included in your Legal Resources plan.

COMPREHENSIVE FINANCIAL PLANNING FOR ALL STAGES OF LIFE

Financial Plan
Receive a comprehensive financial plan tailored to your unique goals and circumstances.

Financial Advisor
Enjoy virtual consultations and continuous support from your personal financial advisor.

Goal Tracking Platform
Achieve your financial goals with personalized insights and recommendations.

INCLUDED SERVICES

Investment Planning
- ✓ Audit your current portfolios and objectives
- ✓ Design an asset-allocation strategy
- ✓ Implement individualized investment strategies
- ✓ Access to non-proprietary Investments across all asset classes

Protection Planning
- ✓ Life, Health and disability Insurance review and implementation
- ✓ Long-Term Care Planning
- ✓ Property & Casualty insurance audit and placement
- ✓ Medicaid, Medicare and Special Needs Planning

Retirement Planning
- ✓ Design a retirement income strategy
- ✓ Maximize Social Security Income
- ✓ Simulate multiple Retirement Scenarios and take action
- ✓ IRA rollovers, Roth conversions and RMD Planning

Estate & Tax Planning
- ✓ Income Tax Planning
- ✓ Tax loss harvesting
- ✓ Tax reduction planning
- ✓ Wills, Trusts, and Estate Tax Planning
- ✓ Beneficiary and legacy planning
- ✓ Business and Succession planning

READY TO GET STARTED?

Call 1-800-728-5768 or email info@legalresources.com to start your financial wellness journey today!

*Legal Resources partners with **Kinnect Advisors**, a Cetera Financial Network Agency for advisory and management services.*

Our financial planning service is included in your Legal Resources plan and provides comprehensive financial guidance at no additional cost. However, certain financial products, such as life insurance, annuities, and other investment-related products, may be subject to third-party fees. Legal Resources partners with Kinnect Advisors, a Cetera Financial Network Agency, for advisory and management services. Any decisions regarding third-party products should be made with a full understanding of their terms and costs.