MIDWEST FINANCIAL PARTNERS

Financial Services

Financial services, including a personal comprehensive analysis, to address your goals and financial objectives

Our group includes highly qualified professionals who have earned the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) designation. We have the technology and resources of a well-established financial services company—coupled with a commitment to personal attention and superior service every step of the way.

What Clients Can Expect From Us

You can expect us to create an effective financial "road map" to address your objectives, based on a comprehensive analysis of your situation and specific needs. Our disciplined, integrated approach creates a framework to help you work toward your financial objectives.

Services & Benefits

Our comprehensive analysis includes an objective assessment of your current situation: patterns of spending, saving, and investment. We determine how well these patterns support your future financial goals and provide you with suggestions and recommendations to augment or enhance your financial plan.

Your privacy and our objectivity are paramount in the process. Every comprehensive financial plan that we prepare includes the following services:

Our Estate Planning Services Include:

- **Cash Flow Analysis.** A review of how well you live within your means—budget, spending, savings/investments, and whether your taxes are in line with your income.
- **Net Worth Analysis.** Determine how your net worth is concentrated (non-liquid assets or evenly dispersed), the amount and effects of debt, and how well your net worth is aligned with your primary financial objectives.
- **Asset Allocation Analysis.** Determine how well your investment assets are aligned with your ability and need to assume risk; assess your portfolio diversification and whether the investment return needed to achieve your goals can be reasonably met by your investment portfolio.
- **Retirement Analysis.** Analyze how well your retirement assets can provide for a comfortable retirement. Ensure that you are aware of all possible retirement strategies available to you.
- **Disability Income Analysis.** Assess how well your assets and income sources can provide sufficient income in the event of disability.
- **Succession Income Analysis.** Assess how much income would be available to survivors in the event of death.
- **Risk Management Analysis.** Review the adequacy of current and future insurance coverage for all risks.
- **Estate Analysis.** Assess the impact of estate settlement costs on the inheritance you pass on to your heirs. Ensure that you are aware of techniques available to replace/reduce settlement costs.

You Can Count On Us To:

- Maintain a high degree of communication and personal service
- Respond quickly to your requests
- Provide ongoing, periodic reviews to monitor your plan and adjust to life changes, and help you implement any recommendations
- Respect your privacy. Above all, we value your trust and keep all information that we collect strictly confidential.

Value Added Advantages

We get to know you and your personal beliefs and preferences so that we can integrate the financial strategies that work best for you. We'll be by your side to help you understand the process and to address your financial objectives. And we stay up-to-date with the latest knowledge and tools in the field to give you exceptional value.

Estate & Life Planning Strategies • Employee Benefits Planning • Wealth Management & Financial Strategies

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