AZT FINANCIAL

Comprehensive Financial Plan

Investment Planning	Estate Planning Review	Retirement Planning	Insurance Review	College Planning/Gifting	Business
Review Portfolio	Wills	Retirement Goal Setting	Review of Existing Policies	529 College Savings Plan	Business Valuations
Asset Allocation	Power of Attorney	Social Security and Medicare	Life Insurance Needs	Education Planning	Review Buy/Sell Agreements
Time Horizon	Living Wills	IRA Contributions	Disability Insurance	FAFSA Guidance	Review Tax Returns
Investment Policy Statement	Health Care Directive	401k Reviews	Long Term Care Insurance	Charitable Giving and Trusts	Key Employee Retention
Rebalancing	Trusts	Annuities	Homeowners Policy Review		Review Shareholder Agreement
	Estate Trusts	Pensions	Auto Policy Review		Business Succession Strategies
		Withdraw Strategies	Additional Risk Review		

Our clients receive a comprehensive plan to help meet their goals, an implementation schedule to ensure all activities to help meet their goals are acted upon, annual review meetings, and coordination with attorney, accountants, insurance brokers and other outside advisors.