

Client Service Experience

FOR PRIVATE CLIENTS OF AFS

FINANCIAL PLANNING

Spring Strategy Meeting

- Financial Purpose
- Cash Flow & Savings
- Retirement Planning
- Investment Plan
- Risk Management
- Estate Planning

LIFE PLANNING

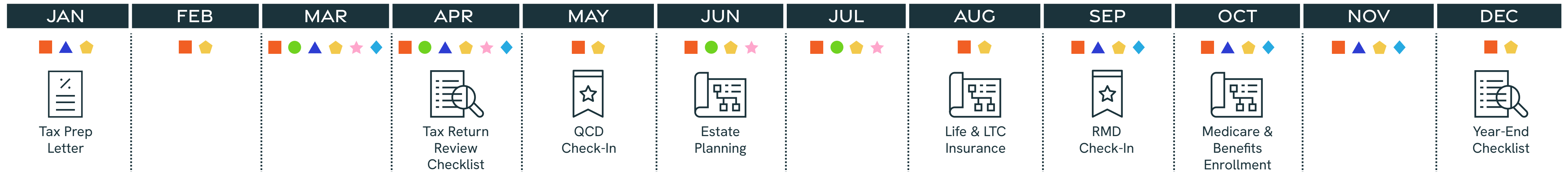
Summer Check-in

- Follow-up on Action Items
- Adjust Plan as Needed
- Celebrate our Progress
- Share Vacation Stories

TAX PLANNING

Fall Strategy Meeting

- Tax Saving Strategies
- Charitable Planning
- CPA Coordination
- Business Owner Benefits
- Tax Report & Projections
- Roth Conversions



BUSINESS & RETIREMENT OPTIMIZATION



MONTHLY DELIVERABLES KEY

- Life Events
- Financial Planning
- ▲ Tax Planning
- ◆ Investment Management
- ★ Risk & Estate Planning
- ◆ Business & Benefits Planning

ONGOING ADVICE

LIFE EVENTS

- Retirement Transition
- Exit & Succession Planning
- Family Financial Planning
- Age-Based Strategies
- Money-Related Questions

INVESTMENT MANAGEMENT

- Personalized
- Tax-Optimized
- Diversified
- Focused on After-Tax Returns