

FINANCIAL PLANNING

Coordinated Planning for Long-Term Clarity

*Financial planning is not a one-time report.
It is structured guidance with ongoing oversight.*



GOALS & FINANCIAL FOUNDATION

Establishing priorities and structural alignment

- Financial Goal & Priority Assessment
- Cash Flow And Savings Structure
- Retirement Readiness Analysis
- Education Funding Planning
- Large Financial Decision Support

INVESTMENT & ALLOCATION REVIEW

Aligning assets with objectives and risk

- Investment Review & Asset Allocation
- Risk Tolerance Alignment
- Portfolio Structure Evaluation
- Rebalancing Guidance
- Performance Review Framework

TAX & PROTECTION COORDINATION

Integrating tax awareness and personal risk planning

- Tax Awareness Planning
- Risk & Insurance Review
- Social Security & Benefits Review
- Basic Estate Planning Review
- Coverage Gap Identification

IMPLEMENTATION & ONGOING OVERSIGHT

Maintaining structure as life evolves

- Implementation Roadmap
- Annual Review & Update
- Planning Adjustments As Needed
- Progress Tracking
- Ongoing Financial Planning Engagement

Starting at \$3,000 (\$250/mo for 1st year) | Ongoing Financial Planning Starting at \$200/mo after 1st year



Cooper White and Associates, LLC

*Financial Planning That **Performs***