

# How a Financial Advisor Can Help

You have goals for yourself, your loved ones, and perhaps your business. Achieving them requires a great deal of thought and skilled planning to ensure your finances support your aspirations.

A trusted financial advisor can help, one who will walk with you through every step of your financial journey.

Whether it's building an investment portfolio, planning for retirement, protecting your loved ones from unexpected events, or crafting your legacy, an advisor can offer holistic guidance to create a financial plan that brings everything together.



## Investment Planning

- Your investment portfolio should directly reflect your goals, time horizon, and risk tolerance. A financial advisor can take these factors into account and help you navigate investing complexities—so you can confidently build an investment strategy that's right for you.
- It's also important to have a trusted advisor during volatile markets, someone who can keep you moving in the right direction, avoiding common investing pitfalls like making emotional, rash decisions.



## Retirement Planning

- No matter how far or close you are to retirement, having a diversified plan is necessary to achieve the comfortable, financially secure retirement you envision.
- A financial advisor can help you identify your retirement goals and assess how your current finances support those goals. Then, your advisor can explain all the retirement income sources available, such as 401(k)s and Social Security, and help you build a plan based on your unique situation.



## Protection Planning

- Protection planning is crucial in helping safeguard you and your family's financial future from unexpected events like death or disability.
- A financial advisor can assess your risks and recommend solutions such as life insurance, disability insurance, or long-term care coverage that can help ensure you and your loved ones are well-protected should an unexpected event occur.



## Estate Planning

- Someday, your wealth will transition to the next generation—and it's important to plan ahead and implement strategies to ensure a smooth, tax-efficient transfer of assets.
- A financial advisor can help you craft your legacy, one built so your wishes are followed, and the people and causes you care about are supported and empowered when you're gone.



**PROTECTION. RETIREMENT.  
INVESTMENT. ESTATE.**

*Trusted Guidance. Comprehensive Solutions.*

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