PERSONAL PLANNING MENU

LEVEL FOUR® Financial
A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

A plan built around **you.**

Client Name ____________________ Date ____________

ESTATE PLANNING

- Essential Documents Design/Analysis
  - Wills
  - Medical Power of Attorney
  - Durable Power of Attorney
  - Advanced Directives
- Trust Design/Analysis
  - Donor Advised Funds
  - Charitable Trusts Report
  - Foundation Design
  - Spousal Trust Analysis
  - Family Limited Partnership Report
- Establish Secure Link for Authorized People
- Probate Flow Chart
- Estate Tax Projection Report
- Tax Efficient Inheritance Analysis
- Estate Equalization Design
- Legacy Discussions
  - Facilitate Heir Meeting
- Create Outline for Future Discussion
  - Revocable/Irrevocable Trust

FAMILY NEEDS PLANNING

- Prenuptial Design/Analysis
- Blending Household Financial Analysis
- Educational Funding Analysis
  - 529's
  - UTMA/UGMA
  - FAFSA Prep
  - Scholarship Search
- Divorce Analysis
  - Preparation Strategy
  - Financial Reporting
  - Settlement Analysis
  - Child Support Analysis
  - Marital Support Analysis
- Eldercare Analysis
  - Aging in Place Report
  - Transitioning to Community Report
  - Professional Care Team Analysis
  - Family Communication Facilitation
  - Create Written Action Plan
- Special Needs Care
  - Family Attorney Coordination/Report
  - Special Needs Trust Design/Analysis
  - ABLE Accounts

INSURANCE PLANNING

- Review Docs - Insurance
- Life Insurance Needs Analysis
- Life Insurance - Review Current
- Beneficiary Review
- Disability Income Needs Analysis
- Disability Income Analysis - Current
- Long-Term Care Needs Analysis
- Long-Term Care Analysis - Current
- Long-Term Care Analysis - Parents
- Health Insurance - Review Current
- Health Insurance Questionnaire
- Medicare/Medigap/Rx Drug Plan - Annual Review
- Vault Upload - Insurance Contracts
- ID Theft Protection
- Personal Home & Auto Review
- Renter's Insurance Review
- Commercial Property and Liability Review
- Umbrella/Excess Coverage Review
- Team Meeting - Insurance Agent
- Annuity Review

INVESTMENT MANAGEMENT

- Investment Policy Statement
- Fee/Cost Assessment
- Volatility Stress Test
- Portfolio Assessment
- Fiduciary Investment Consult
  - Current 401k/457/403b
  - Previous 401k/457/403b
  - Assets Held Away
  - Real Estate
  - Non-Traditional Assets
  - Self-Directed Accounts
- Education – Funds vs. Single Securities
- Education – Portfolio Construction

Tracking #LFG-01-2024

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Few people randomly arrive where they want to be.

Let's discuss your plan that seeks to help you get where you want to go.

Level Four Financial does not offer tax nor legal advice. We suggest that you discuss your specific situation with a qualified tax or legal advisor.

ORGANIZE & ANALYZE

- Personal Financial Website
- Cash Flow Analysis
  - Broad Work Sheet Report
  - Budget Accountability Partnership
- Emergency Reserve Analysis
- Ongoing Reporting
  - Historical Net Worth Statement
  - Balance Sheet
  - Asset Allocation
- Debt Strategy
  - Debt Squash Analysis
  - Leverage Analysis
  - Credit Report Analysis
  - Important Document Analysis
  - Upload to Secure Vault
  - Provide Secure Access
  - Employee Corporate Benefits
  - Deeds & Titles

RETIREMENT PLANNING

- Retirement Readiness Tool
- Retirement Income Projection
- Required Minimum Distribution Strategy
  - Education Report
  - Roth Conversion Strategy
  - Qualified Premium Analysis
- Mailbox Income Analysis
  - Dividend/Income Strategy
  - Rental Property Analysis
  - Pension Analysis
  - Social Security Analysis
  - Guaranteed Income Analysis
- Annuity Review

TAX PLANNING

- Tax Report Analysis
- Charitable Giving Report
- Maximixing Qualified Plans Report
- Tax Efficient Growth Design
- Tax Free Income Design

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