WEALTH MANAGEMENT SERVICES

- We coordinate closely with your attorney, accountant and your other advisors.
- We hold regular meetings and ensure that all planning is well coordinated and implemented.
- We archive documents such as insurance policies, estate planning and legal documents, and tax returns.

Investment Planning

Portfolio Review

Asset Allocation

Withdrawal Strategies

Investment Policy Statement

Evaluate Stock Concentration Risk

Stock Options

Restricted Stock

Retirement Planning

Retirement Goal Setting

Social Security Claiming Strategies

IRA Contributions and Conversions

Required Minimum Distributions

Review Employer Sponsored Plans

Analysis of Pensions and Annuities

Self-Employed Retirement Plans

Executive Benefits

Estate Planning and Review

Wills

Powers of Attorney

Advance Medical Directives

Revocable Living Trusts

Irrevocable Trusts

Estate Tax Planning

Charitable Giving and Trusts

Cash Flow Planning

Income Sources

Expenses and Spending

Debt Management

Extraordinary Expenses

Emergency Fund

Dollar Cost Averaging

Income Tax Planning

Manage Capital Gains

Asset Location Strategy

Tax Loss Harvesting

Deductions and Credits

Potential Roth Conversions

Taxation of Employee Benefits

Assistance to Loved Ones

Gifting

Education Planning

Caring for Elderly

Roth IRA's for Children

UGMA/UTMA

Financial Counseling for adult children of clients

Insurance Review

Review Existing Policies

Life Insurance Needs

Life Insurance Trusts

Long Term Care Insurance

Disability Insurance

Health Insurance

Liability Coverage

FOCUS
Wealth Management Ltd
Sound Advice — Uncommon Service™

112 West Washington Street, Suite 201 Middleburg, VA 20117   540.931.9051
11325 Random Hills Rd., Suite 210 Fairfax, VA 22030   703.760.3673
www.focus-wealth.com