BaldwinClarke
— Planning has its rewards. —

FINANCIAL PLANNING

All planning at a basic level involves matching goals with resources.

Financial planning starts by looking at all aspects of your financial life (saving, investing, risk planning/insurance, tax planning, education funding, retirement planning and estate planning) and creates a roadmap for you to follow.

Detailed financial analysis determines the resources that you need to meet those goals.

We work with you to evaluate potential strategies and solutions that will get you to your goals as coach and counsel to educate and guide.

What We Do

- Analyze your current situation and identify your goals and objectives.
- Generate financial projections of estimated income, taxes, expenses, net worth, and estate taxes.
- Coordinate your personal and business resources to develop tax-efficient strategies, when appropriate.
- “Scrub” current will and trust documents, insurance policies, and tax returns and identify any obstacles.
- Create a risk management assessment, including life, disability, and LTC insurance planning.
- Customize recommendations for all aspects of your financial plan.
- Provide periodic plan reviews.
- Collaboration with other professionals, such as your attorney or CPA, as appropriate during the plan development and implementation.