FAMILY FOCUSED FINANCIAL

Preparing for Your Best Future

The Benefits of Working with Family Focused Financial

- Our company specializes in Retirement Planning
- We practice with a fiduciary standard that requires us to do what is in your best interest
- We make house calls
- We give complimentary second opinions
- We review your current income, expenses, assets, liabilities, legal documents, and insurance
- We find the 'holes' in your current retirement plan, if any
- We provide a personalized, comprehensive retirement plan that addresses these 'holes'
- We determine your risk tolerance and reflect that in your investment portfolio
- We provide strategies to tame your budget and reduce debt quickly
- We recommend ways to mitigate risks to your family and savings, including: long-term care, premature death, market volatility, and tax liabilities
- We offer a wide range of insurance and investment products
- We provide investment management and comprehensive financial planning under one fee
- We help you perform beneficiary audits
- We prefer a long-term relationship with you rather than making a quick sale and moving on
- We provide legacy planning to bless your family, avoid conflict, and reduce tax waste

This is what we mean by...

Preparing for Your Best Future!

Our Commitment to You
We will...

- Listen
- Return messages in a timely fashion
- Serve you with integrity and respect
- Make recommendations based on your family's financial priorities
- Thoroughly answer your questions and explain your options
- Look for opportunities to add value to your family, including: client appreciation and educational events
- Provide educational and organizational tools, such as infographics, worksheets, and newsletters
- Monitor and adjust your retirement plan based upon your changing circumstances
- Continue to receive training as your ChFC® (Advanced Financial Planner)
- Help you optimize Social Security, Pensions, 401(k)s, and IRAs to generate consistent and dependable income during retirement that you won't outlive.

Craig Anderson, ChFC® | President | **Family Focused Financial**
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