

FINANCIAL PLANNING

Financial Planning is the overall scope of services that assists you in meeting your life goals. It combines the use of many strategies such as investment management, retirement planning, employee stock option analysis/concentrated positions, income tax planning, planning for children's education and estate planning. Financial planning includes analyzing and evaluating your current financial status to create a customized plan to help meet your life goals and future needs.

WHAT PROCESS DOES **KABAREC FINANCIAL ADVISORS** USE FOR FINANCIAL PLANNING?

All Clients are viewed as individuals — each with his or her own unique goals. All areas of your financial situation are evaluated in order to build a comprehensive financial plan. After careful analysis of the plan, the firm makes specific recommendations and assists you in the implementation phase of the plan. We then monitor your progress carefully and update your plan periodically as your lifestyle and circumstances change.

WHAT ARE THE BENEFITS OF A FINANCIAL PLAN?

A custom prepared financial plan provides a road map for your future. It helps you understand how every decision you make affects other aspects of your plan. Being able to view all of your decisions as a whole rather than independently, you can consider what the short and long-term effects will be on your overall success. Having a financial plan mapped out for you by our experienced, objective advisory team enables you to stay on course and secure your financial future.



KABAREC FINANCIAL ADVISORS, LTD
BUILDING BETTER FUTURES