



Financial Life Designs<sup>llc</sup>

## Our Pledge to You

- ❖ Financial Life Designs LLC will deliver a fully comprehensive "action plan." The topics include Cash Flow, Taxes, Investments, Estate Planning and Insurance.
- ❖ Your Financial Plan will be continually monitored and updated as you progress towards your goals.
- ❖ We never receive commissions. If changes are needed to your insurance (life, health, auto, etc), we will work with your existing agent or I can recommend one to you.
- ❖ I and Financial Life Designs staff will work together to develop and implement an investment strategy that best suits your needs and goals.
- ❖ We will advise you on any financing (mortgages, autos, RVs, boats, etc) issues and refer you to a specialist if/when needed.
- ❖ Periodically I will review and verify that the necessary legal documents are in place (wills, trusts, etc). Once again, I will work with your existing attorney or I can recommend several to you.
- ❖ I will review your personal tax return and work with your preparer to minimize your payments and any surprises upon filing.
- ❖ I will always be available to provide "coaching" on all your financial issues.
- ❖ We will only work with a small amount of handpicked clients. We want to assure you get our utmost attention.

Financial Life Designs is here so you can delegate as much of your financial life as possible. This makes more time with family, friends and passions possible. We believe that you should have ***The Time and the Freedom to follow your Dreams and when Roadblocks Arise, Someone to Lean on.***

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