



MOUNTAIN FINANCIAL PROCESS

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MOUNTAIN FINANCIAL PROCESS

45-55

CAMP 2 - INCOME CLIMB

- Career/Income Advancement
- Cash Flow Analysis
- Establish an Estate Plan
- Retirement Income Planning
- College/Education Planning
- Review & Adjust Financial Plan
- Maximize Employee Benefits & Savings Contributions
- Review & Adjust Investment Plan & Risk Tolerance

65+

SUMMIT - WEALTH CLIMB

- Celebrate
- Income Strategy Decision
- Social Security Decision
- Medicare Decision
- Review & Adjust Estate Plan
- Legacy Planning
- Charitable Giving & Gifting Strategies

55-65

CAMP 3 - INVESTMENT CLIMB

- Celebrate Family Goals Achieved
- Retirement Income Analysis
- Social Security Analysis
- Medicare Planning
- Review Financial Plan
- Review Protection Plan
- Begin Planning Life in Retirement
- Long Term Care Planning

35-45

CAMP 1 - FOUNDATIONAL CLIMB

- Establish Financial/Investment Plan
- Risk Tolerance Assessment
- Family Planning
- Review Asset Protection Plan
 - Life Insurance, Income Protection

25-35

BASECAMP

- Reserve Funds
- Debt Analysis
- Budget
- Establish Savings Accounts
 - 401K, Roth IRA, IRA, Investment Accounts

Congratulations, your family is protected and future is funded. Now you can build your legacy and experience life to its fullest.

DESCENT - CREATING A LEGACY OF MEMORIES

- Family Time
- Sunsets with Friends
- Travel
- Grandchildren
- Volunteer Projects
- Peace



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