WELLS FARGO Advisors

What does wealth planning mean to you?

BASIC NEEDS				COMPREHENSIVE SERVICES			HIGHLY SPECIALIZED SERVICES		
Cash flow & debt management	**Retirement planning**	**Investment planning**	**Education planning**	**Tax planning**	**Insurance planning**	**Estate planning**	**Family needs planning**	**Philanthropic planning**	**Business owners & key executives**
Develop net worth statement	Review retirement savings strategy	Assess risk tolerance	Establish tax-efficient savings plans	Review tax-efficiency in asset location	Review insurance policies	Legacy Planning	Divorce planning	Develop family mission & values	Assess cash management strategy
Examine current savings & expenses	Develop retirement vision and goals	Analyze current portfolio	Assess affordability and funding options	Harvest tax losses	Assess coverage adequacy for life, long-term care, disability	Help establish or update trust accounts	Eldercare planning	Create impact goals and priorities	Advise on employee benefit plans
Identify short- & long-term savings goals	Review corporate benefits	Translate savings goals to investment objectives	Maximize tax-free gifts	Advise on tax-aware strategies	Develop strategies to mitigate risks	Review appropriate control parties: financial & health	Plan for special needs children	Fund charitable strategies	Analyze business disruption risks
Establish emergency fund	Claiming strategy for social security	Create asset allocation strategy	Help children save and budget	Keep up to date on tax law changes		Organize estate documents	Plan for a solo journey	Optimize tax benefits	Assist with business transition planning
Create optimal savings strategy	Retirement distribution strategy	Construct tax-efficient portfolios	Provide education on FAFSA & loan options			Review asset titling		Philanthropic planning	Assess compensation plans
Analyze liabilities for savings opportunities	Retirement income planning	Review investment performance				Create and manage gifting strategies			Develop strategy for stock options
	Planning for healthcare & caregiver expenses					Assist with charitable giving			

www.milehighwealthmanagement.com

COMPREHENSIVE PLANNING + FINANCIAL COUNSEL + WEALTH MANAGEMENT

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