



# Hargis Financial

Financial Planning • Investments • Insurance

***Let me focus on the concerns of tomorrow, so you can focus on the joys of today!***

- What are your most important financial goals? Now and beyond?
  - This will help you evaluate your current financial situation.
- No matter your life stage or concerns...I can help! Let's get started today.

## **Personal Finance**

- Budgeting
- Increasing Savings Rates
- Debt Reduction
- Build Cash Reserves

## **Estate Planning**

- IRA Beneficiary Designations
- TOD & POD Designations
- The Five Estate Planning Documents

## **Retirement Planning**

- Covering Essentials
- Ensuring Lifestyle
- Choosing Pension Distributions
- Preparing for the unexpected
- Leaving a Legacy

## **Investment Planning**

- Goal Development and Efficiency
- 401k/403b Allocation Enhancement
- Including Alternative Investments
- Building Personalized Asset Allocation Policy
- Simple Steps to Build Wealth
- Rollovers, Consolidation and Transfers

## **Protection Planning**

- Auto, Home and Personal Liability (Umbrella)
- Health, Workplace-Group Evaluation & Disability
- Life, Legacy and Survivor Protection
- Long Term Care

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## Tax Planning

- Planning for Income
- Planning for Estate
- Increased Income

## Government Benefits

- Planning for Social Security
- Understanding Medicare

## Special Situations

- Planning for Major Purchase
- Family and Life Situations
- Dealing with Periods of Crisis
- Unique Elder Care Issues

## Education Planning

- Funding for Education
- Asset Management Strategies

## Business Planning

- Starting or Buying a Business
- Insurance, Tax Planning, Succession
- Retirement Plan Options

## Financial Planning Resources

- Budget Consulting
- Financial Protection Review
- Personalized Financial Plan

## Personal Notes and Questions

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