Intentional
Wealth Advisors, LLC

Intentional Guided Planning

- Setting goals
- Creating a budget
- Debt management
- Student loans
- Emergency funding
- Mortgage review

- Good reasons to invest
- Review of current portfolio
- Asset allocation
- Tax return review
- Online investment options

- When you're newly married
- When you're young and single
- Life insurance
- Disability insurance
- Health Savings and Flexible Spending Accounts
- Renter's insurance

- Setting goals
- Review of employer-sponsored plan
- Traditional v. ROTH IRA

- Reasons for an estate strategy
- Beneficiary designations
- Guardians for minor children
- College planning
- UGMA/UTMA

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Securities and financial planning offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC.