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A Road Map to Your Financial Goals

SCHEDULE YOUR FIRST FREE 30-MINUTE APPOINTMENT AT

www.calendly.com/info-myw

Website: www.maptoyourwealth.com

IF YOU HAVE ANY OF THE FOLLOWING QUESTIONS, YOU MAY BENEFIT BY CONSULTING A FINANCIAL PLANNER.

How much do I need to save every month to retire in 5 years? 10 years? 20 years???

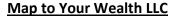
I am CLOSE TO RETIREMENT. How much can I safely withdraw without the fear of outliving my funds?

 $^{
m I}$ am ALREADY RETIRED. In which $^{
m What}$ kind of Life order, should I start withdrawing money from different accounts?

From Taxable Accounts? From Tax Deferred Accounts? From Tax Free Accounts?

What is the best strategy to file for SOCIAL SECURITY?

Insurance is best for my family situation?



Please visit our website and feel free to contact if you have any questions.

Virtual meetings available via audio or video calls.

Investment Management

Investments are managed by building customized portfolios based upon each individual clients' risk tolerance and time horizon.

How much Life Insurance do I need?



Do I have enough Disability Coverage? Too Less? Enough? Is it costing me too much?

What is the best debt reducing strategy so I can be debt free sooner?

Is ESTATE PLAN for rich people only?



What is best TAX PLANNING STRATEGY while I am working and Investing? While I am with-

Can I afford to buy a House? How much should I save every

month so I can buy a house in 3 years? 5 years???

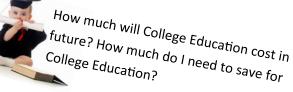


Is my portfolio diversified? Do I qualify to contribute to Roth IRA? Is Roth Conversion right choice for me?

Am I making tax efficient invest-

ment choices between taxable ac-

counts and tax deferred accounts?



GOOD DEBT

BAD DEBT \$\$\$!