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Map to Your Wealth LLC

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.

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?

Is ESTATE PLAN for rich people only?



Am I making tax efficient investment choices between taxable accounts and tax deferred accounts?
 Is my portfolio diversified?

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



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



How much will College Education cost in future? How much do I need to save for College Education?

I am ALREADY RETIRED. In which 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?

How much Life Insurance do I need?

What kind of Life Insurance is best for my family situation?



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

GOOD DEBT



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

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???

