FINANCIAL SYMMETRY
5438 WAKE PARK BLVD. SUITE 310 RALEIGH NC, 27607

Working in a Wealth Management relationship with FSI, you'll have a team with accountability coaching to help best answer your ongoing financial questions.

WEALTH MANAGEMENT - HOW WE HELP

Financial Planning
- Goals & Accomplishment Tracking
- Net Worth/Cash Flow Targets
- Annual Savings Targets
- Feasibility of Plan Success
- Retirement Withdrawal Strategies
- Track Spending To Plan Targets

Tax Planning
- Review Tax Return
- Annually Review Tax Situation
- Roth Conversions
- Tax Loss Harvesting
- Charitable Tax Planning Tools
- Social Security Analysis

Estate Planning
- Periodic Will and Trust Reviews
- Coordination with Professionals
- Beneficiary Reviews
- Gifting Strategies
- Estate Tax Planning

Risk Management
- Review of Current Policies
- Life Insurance Needs Analysis
- Long-term Care Analysis
- Disability Insurance Reviews
- Umbrella Insurance Reviews

Investment Planning
- Implement Customized Portfolio
- Behavioral Coaching
- Consolidation of Accounts
- Adjust/Rebalance Asset Allocation
- Asset Location
- Pension Analysis

Life Event Planning
- Debt Management
- Employee Benefit Analysis
- Career Changes
- Business Exit Analysis
- Stock Option Planning
- Education Planning

Peace of Mind
- Time Savings
- Secure Portal – FSI Client Center
- Objective Feedback
- Spouse & Children Involvement
- Integrated & Holistic View
- Review Meetings

You'll also receive ongoing communications with curated articles, podcasts and videos answering common client questions.