

WEALTH MANAGEMENT FINANCIAL PLANNING

FINANCIAL PLANNING

We know you work hard for your money, and having clear financial goals, and a plan to achieve them, lets you live life on your terms. Let US help you identify and map out your plan, and come alongside you as you walk through your life experiences.

We invite you to work with US to create a curated, customized financial plan designed to help outline what steps you should consider taking in order to reach and achieve your financial dreams and goals.

BUILDING YOUR FINANCIAL PLAN

At a high level we are looking at the following when creating your financial plan:



Savings &
Investments



Budget & Cash Flow
Management



Retirement



Insurance



Estate
Planning



Social Security
& Medicare



Employee
Benefits



Taxes &
Tax Strategy

WHO SHOULD HAVE A FINANCIAL PLAN?

Anyone who has a consistent source of income and out-going expenses should have a structured financial plan in order to better their financial future. Here are a few characteristics of people we can help:

- *Serious about achieving financial success*
- *Motivated to improve*
- *Value a pro-active thinking partner*
- *Wants to make smart decisions with their money*

WHY SHOULD YOU HAVE A FINANCIAL PLAN?

Creating a financial plan can help you:

- *See your finances holistically, so you understand how your financial decisions impact your financial success.*
- *Be prepared to recalibrate and make smart financial decisions when life events happen*
- *Create thoughtful strategies that take into account your long-term financial goals*
- *Understand what you need to do to improve your financial future*

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HOW CAN YOU GET A QUALITY FINANCIAL PLAN?

By partnering with a financial professional, you gain:

- **Organization:** Bringing order to your Financial Life
- **Accountability:** Follow through on financial commitments
- **Objectivity:** Bring insight from the outside to help avoid emotionally driven decisions
- **Proactivity:** Anticipate life transitions to help be financially prepared
- **Education:** Providing knowledge/education pertaining to your Financial life
- **Partnership:** Working together to help you achieve the best Financial Life possible

OUR PRICING VS. OTHERS

US Community Wealth Management	Large Widely Known Financial Advisors	Mid-Sized Widely Known Financial Advisors
Financial Plan Cost: \$675	Financial Plan Cost: \$3,000	Financial Plan Cost: \$1,750

OUR APPROACH

US Community Wealth Management uses a personal, straight-forward, customized approach to investing. Our advisors focus on understanding your financial goals, your current financial state, and then works with you to develop diversified investment strategies designed with you and for you. Contact us today for more information.



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**CONTACT US FOR MORE INFORMATION
OR TO SCHEDULE A CONSULTATION**

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