Knuth Financial Life Planning

Our Comprehensive Planning Approach

Your concerns are our top priority.
Please take a few minuets to check the items that you feel
are most relevant to your needs so we can discuss during our review.

KFLP Specialized Services

- ☐ Financial Planning
- ☐ Personal Goal Setting
- ☐ Personal Health and Wellness
- ☐ Charitable Giving
- ☐ Alternative Solutions for Stress Management

*Please bring a recent pay stub

Life Transitions

- ☐ Career Path/Job Search
- ☐ Planning for Relationship, Marriage and/or Children
- ☐ Financial Impact of a Divorce
- ☐ Special Needs Family Member
- ☐ End of Life Planning/Estate Settlement

Financial Planning Process

- ☐ Cash Flow Analysis
- ☐ Coordinate and Efficiently Organize Assets
- ☐ Debt Consolidation and Management
- ☐ Networking with Other Financial/Legal Professionals
- ☐ Coordinate Down-sizing of Property and Possessions
- ☐ Facilitate Real Estate Rental, Purchase or Refinance
- ☐ Multi-Generational Planning

Retirement Strategies

- ☐ Evaluation of Retirement Timeframe and Income Goals
- ☐ Review of Employer Plan(s) and Funding Options
- ☐ Maximize Personal Retirement Solutions (IRAs, 401K, pensions)
- ☐ Evaluate Social Security Benefit Options
- ☐ IRA Required Minimum Distributions (RMD 70 1/2)
- ☐ Corporate Retirement Plans/Corporate Cash Balance Plans

*Please bring recent 401K/IRA statements.

Risk Management Solutions

- ☐ Life Insurance
- ☐ Disability Income Insurance
- ☐ Long Term Care Insurance
- ☐ Health, Medicare and Medicare Supplemental Insurance
- ☐ Auto and Home Owners Insurance

*Please bring current policies and/or statements.

Income Taxes

- ☐ Tax Deductions, Deferrals, Exemptions and Credits
- ☐ Strategies to Minimize Income and Estate Taxes

*Please bring most recent tax return.

Education Funding

- ☐ Evaluate Cost – Public vs. Private
- ☐ Funding and Super Funding of 529 Plans
- ☐ FAFSA Prep and Coordination of Financial Aid for College
- ☐ Student Loan Consolidation and Repayment

*Please bring recent 529/UTMA statements.

Investing

- ☐ Clarify and Examine Market Expectations
- ☐ Risk Tolerance Evaluation
- ☐ Establish Asset Allocation Strategies
- ☐ Customized Portfolio Building

*Please bring current investment statements.

Estate Coordination

- ☐ Review Existing Account Registrations and Titling
- ☐ Align Beneficiary Designations to Match Estate Documentation
- ☐ Wills/Trusts and Special Needs Trusts
- ☐ Powers of Attorney (durable and healthcare)

KNUTH
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