Method 10™: The 10 key wealthcare issues that you and your financial advisor systematically address in order to implement comprehensive financial solutions.

INVESTMENT PLANNING	1	Integrated Asset Allocation and Portfolio Design Customized Asset Management Programs Diversification Strategies Alternative Investments
TAX PLANNING	2	Income Tax and Estate Tax Planning Tax-Advantaged Investing Charitable Planning Trust Services
INCOME PROTECTION AND ASSET PRESERVATION	3	Long-Term Care Insurance Disability Protection Income Replacement Creditor Protection
RETIREMENT PLANNING	4	IRA Rollover and Distribution Planning Income Projection Analysis Fixed Income Strategies Qualified Plan Design and Compliance
BUSINESS PLANNING	5	Business Succession Buy-Sell Agreements Non-Qualified Retirement Plans Key Employee Retention
ESTATE PLANNING	6	Wealth Transfer and Tax Reduction Charitable Gifting Trust Services
INSURANCE	7	Life Insurance Analysis and Design Long-Term Care Insurance Disability Protection
EDUCATION PLANNING	8	Coverdell Education Savings Accounts 529 College Savings Plans UGMA/UTMA Accounts Trust Services
SPECIAL SITUATIONS	9	Divorce Incapacitation and Control of Assets
DEBT MANAGEMENT	10	Creditor Protection Efficient Credit Management

Method 10™

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