MasterPlan
RETIREMENT CONSULTANTS

Don't Be Confused…

Many people use a professional to help them with their retirement plans. Some use a broker or an advisor, while others use a banker, CPA or insurance agent.

Don't be confused! Most of these professionals don't create plans—they just sell products. If your professional discusses policies or investments ***before*** they discuss your needs, dreams and desires, you're not experiencing financial planning, you're just being sold something.

Use the table below to see if you're really getting the whole package of planning, or just bits and pieces….

MasterPlan		Your Current Professional
☑	**Tactical, Active Money Management**	☐
☑	**Tax Reduction Strategies**	☐
☑	**Guaranteed Income Planning**	☐
☑	**Social Security Maximization**	☐
☑	**ABC Method of Risk Management**	☐
☑	**Estate Planning & Coordination**	☐
☑	**Tax-free Income Strategies**	☐
☑	**Long Term Care Options**	☐
☑	**Risk vs. Return Suitability Reviews**	☐
☑	**A REAL, Written, Personalized Financial Plan**	☐
☑	**Social Security Tax Reduction Methods**	☐
☑	**Ongoing Updates to Your Plan**	☐

Contact us for a Complimentary 90-Minute Strategy Session to see where you stand!

770-980-9262 www.masterplanretire.com