YOUR Logo

Service Offering

{{Advisor/Firm Name}} provides comprehensive Goals-Driven Planning and Investment Management Solutions for clients along with the optional concierge services listed below.

Planning	Planning	Cash Flow and Budget	Income Tax Planning	Assistance to Loved Ones
Wills Power of	Retirement Goal Setting	Income Sources Expenses and	Review of Cost- Basis	Gifting
Attorney	Social Security and Medicare	Budgeting Debt	Review Realized Gains	Education Planning
Health Care	Business Planning	Management One-Time	Carry Forward Losses	Caring for Elderly
stment Trusts	IRA Contributions	Expenses Planned Large	Tax Loss Harvesting	529 College Savings Plans
Insurance Trusts	and Conversions	Expenses Deductions a Emergency Credits	Deductions and Credits	Roth IRA's for Children
ReviewGuardians forInvestmentsMinor ChildrenHeld Outside of the FirmCharitable Giving and Trusts	Employer- Sponsored Plans and 401(k)'s Annuities and Pensions RMD's and Withdrawal	Funding Dollar Cost	Potential Roth Conversions	UGMA/UTMA
		Averaging Mortgage Review Lines of Credit	Health Savings and Flexible Spending Accounts	
	Power of Attorney Living Will Health Care Proxy Trusts Irrevocable Life Insurance Trusts Estate Taxes Guardians for Minor Children Charitable Giving	Power of AttorneySettingAttorneySocial Security and MedicareLiving Willand MedicareHealth CareBusiness PlanningProxyPlanningTrustsIRAIrrevocable Life Insurance Trustsand Contributions and ConversionsEstate TaxesEmployer- Sponsored Plans and 401(k)'sCharitable Giving and TrustsAnnuities and PensionsRMD's and	Power of AttorneySettingExpenses and BudgetingLiving Willand MedicareDebtHealth CareBusinessManagementProxyPlanningOne-TimeTrustsIRAExpensesIrrevocable LifeandExpensesInsurance TrustsContributionsPlanned LargeEstate TaxesConversionsEmergencyGuardians forSponsored PlansDollar CostMinor Childrenand 401(k)'sAveragingAnnuities andMortgageand TrustsRMD's andLines of CreditWithdrawalStrategiesStrategies	Power of AttorneySettingExpenses andBasisAttorneySocial SecurityBudgetingReview RealizedLiving Willand MedicareDebtGainsHealth CareBusinessManagementCarry ForwardProxyPlanningOne-TimeLossesTrustsIRAExpensesTax LossIrrevocable LifeContributionsPlanned LargeHarvestingInsurance TrustsConversionsEmergencyCreditsGuardians forSponsored PlansDollar CostConversionsMinor Childrenand 401(k)'sAveragingHealth Savingsand TrustsAnnuities andMortgageand FlexibleRMD's andLines of CreditAccountsWithdrawalStrategiesStrategies

Retirement Plans

Wealthcare does not provide legal and tax advice. Always consult a qualified tax advisor regarding your personal tax situation and a qualified legal professional for your personal estate planning situation.

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