

Newkirk's

FINANCIAL PLANNING GUIDES

Fact Sheet

Newkirk's *Financial Planning Guides* are authoritative, easy-to-read communications that will encourage your clients and prospects to work with you to begin or continue their journey to financial security. Available in printed and electronic formats, the *Guides* explain financial planning concepts in terms your clients and prospects will understand.

Topics include:

- Estate Planning
- Retirement Planning
- Personal Financial Planning

Each *Guide* is updated to reflect recent tax legislation and is **FINRA reviewed** each year.



Estate Planning Guide

Printed booklet & Internet/HTML version

Let the *Estate Planning Guide* support your efforts in educating high net worth clients and prospects about the importance of an estate plan that can help preserve their assets and minimize their estate taxes.

The *Estate Planning Guide* covers:

- Federal estate tax and planning strategies
- Disability planning strategies
- A list of events that should trigger an estate plan review



Retirement Planning Guide

Printed booklet & Internet/HTML version

The *Retirement Planning Guide* will reinforce your organization's expertise in investment and planning strategies by outlining the essentials of retirement planning and how you can help them reach their goals.

The *Retirement Planning Guide* includes:

- A worksheet that helps estimate retirement needs
- Information on retirement income sources: 401(k) plans, IRAs, and more
- A risk assessment worksheet to determine tolerance for risk



Personal Financial Planning Guide

Printed booklet & Internet/HTML version

Educate your audience on key financial planning strategies with the *Personal Financial Planning Guide* — includes several helpful worksheets and charts.

The *Personal Financial Planning Guide* covers:

- Investment and education planning
- Life insurance and disability planning
- Retirement and estate planning



NEW!

Complete your communications platform with:

Achieving Your Financial Goals — PowerPoint® presentation

Cover all your communication opportunities with this robust presentation including content from all three *Guides* — comes complete with presenter's script.



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