CARSON WEALTH

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FOCUSED WEALTH PLAN

Financial planning tailored to your individual objectives

Talk to your Advisor about signing up for this ***COMPLIMENTARY*** *service!*

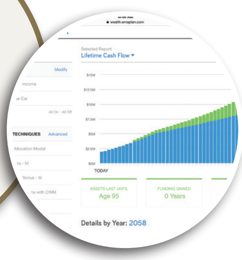
1 Determine Family Index Number

The individual rate of return designed to help you work toward achieving your goals and objectives with confidence

- Allows your advisor to construct a portfolio designed to help you achieve or beat your number over the long term with the least amount of risk
- Used as a benchmark to gauge performance over the length of the plan
- Updated at least on an annual basis during annual client review

2 Personalized Cash-Flow Based Planning

Narrowly tailored to identify and address your specific goals and objectives



- Interactive, cash-flow based wealth planning platform allows planner to customize recommendations
- Stress test recommendations under different market conditions
- Data protection backed by a modern data center meeting or exceeding industry standards

3 Risk Management Planning

Comprehensive analysis of life, disability, long-term care and other risk management solutions

- Assess current risk management coverage and align recommendations with risks posing the greatest threat to your financial future
- Partner with companies meeting our stringent due diligence requirements to find the most efficient and suitable solutions for your particular needs
- Create clarity, predictability and cost efficiency in your risk management portfolio

4 Social Security Analysis

Custom analysis of every Social Security claiming option available

- Compare and analyze every social security claiming strategy
- Develop your own personal claiming strategy based on your unique situation
- Life expectancy zones help clients find the most appropriate claiming strategy based on their health and family history

Sources: *The Wall Street Journal, The Best Online Tools for Retirement Planning and Living, January 19, 2015 | SocialSecuritySolutions.com | emoneyadvisor.com/Products*