

# HOW WE CAN SERVE YOU



## PLAN

to help create financial confidence and peace of mind.

- Establish and review your personal goals and objectives
- Review your personal financial journey and your perspectives about money
- Cashflow review, analysis, and planning
- Education funding tools and strategies
- Special Needs and Elder Care planning
- Retirement planning, including Social Security optimization, and savings & withdrawal strategies
- Tax planning and tax return review
- Employee benefits review and integration
- Executive compensation review and analysis
- Closely held business planning
- Coordination with your other professional advisors



## INVEST

to help grow your wealth and income.

- Align your portfolio with your personal goals and objectives
- Determine asset allocation
- Portfolio selection and periodic strategy review
- Ongoing portfolio monitoring and rebalancing
- Tax mitigation strategies
- Ongoing investment education
- Investment Committee due diligence and ongoing performance & expense monitoring



## PROTECT

your loved ones, your property, and your lifestyle.

- Life insurance analysis
- Health insurance and Health Savings Account review
- Disability insurance analysis
- Long-Term Care analysis
- Property and Casualty insurance review
- Medicare and Medicaid planning



## IMPACT

the people and purposes most important to you.

- Estate plan review
- Wealth transfer strategies
- Charitable giving tools and strategies
- Caregiving succession planning
- Family education

## ADDITIONAL OFFERINGS

Company Retirement Plans  
Endowments & Foundations

*Please Note: Foster Group does not serve as an attorney, accountant, or insurance agent. Foster Group does not prepare estate planning documents or tax returns, nor does it sell insurance products. Foster Group is not engaged in the practice of law or accounting. All investment strategies have the potential for profit or loss. Asset allocation and diversification do not ensure or guarantee better performance and cannot eliminate the risk of investment losses. PLEASE SEE IMPORTANT DISCLOSURE INFORMATION at [www.fostergrp.com/disclosures](http://www.fostergrp.com/disclosures). A copy of our written disclosure Brochure as set forth on Part 2A of Form ADV is available at [www.fostergrp.com](http://www.fostergrp.com).*



Your Financial Life, Truly Cared For<sup>®</sup>