



GAMBIN FINANCIAL GROUP

Menu of Services

Foundational Planning Services

Services Offered:

Risk Management

- Insurance Audit & Planning
- Debt Reduction Strategies
- Executive Summary w/ Objectives
- Liquidity Planning
- Risk Analysis

Key Objectives & Growth Planning

- Personal Financial Statement
- Cash Flow Planning
- Qualitative & Quantitative Goal Planning
- Budgeting

Legacy Planning

- Distribution Strategies
- Estate Planning

Established Planning Services

Services Offered:

All Foundational Planning, Plus:

Risk Management

- Asset Protection
- Access to Legal Experts
- Key Info Audit

Tax Planning

- Tax Return Audit
- Income Tax Planning
- Cumulative Income Tax Plan
- Distribution Tax Planning
- Access to Advisory Team

Key Objectives & Growth Planning

- Goal Planning w/ Probability Analysis
- Investment Philosophy Planning
- Tax & Risk Diversification Strategies
- Employee Benefits Strategies

Legacy Planning

- Cumulative Tax Planning
- Estate Transition Planning
- Health Insurance Cost Planning
- Lifetime Income Planning
- Identity Protection

High Complexity Planning Services

Services Offered:

All Established Planning Services, plus:

Risk Management

- Buy/Sell Analysis
- Credit Score Audit

Tax Planning

- Estate Tax Strategies
- Access to Tax Experts

Key Objective & Growth Planning

- Executive Summary w/ Objectives
- Social Security Maximization
- Advisory Board Creation
- Special Needs Planning
- Divorce Financial Planning
- Aggregated Document Management in Personal & Private Online Vault

Legacy Planning

- Charitable Gift Planning