WEALTH AND INVESTMENT MANAGEMENT FIRM

OFFER INVESTMENT MANAGEMENT AND COMPREHENSIVE FINANCIAL ADVICE

TARGET AUDIENCE

- 1. Companies or Employees in Specific Industries
- 2. Couples With Double Income
- 3. Families With Kids
- 4. Single, Professional Women
- 5. Small Business Owners
- 7. Other Life Transitions

  Divorce, New Job, Retirement, Death of Spouse

FACTORS WHICH IMPACT THEM

- It is an investment advisory service that combines other financial services to address the needs of **affluent clients**.
- A wealth management advisor is a high-level professional who manages an affluent client's wealth holistically, typically for one set fee.
- A wealth management advisor utilizes the diverse financial disciplines such as financial and accounting, and tax services, investment advice, legal or estate planning, and retirement planning, to **manage an affluent client's wealth as a bundle of services**.

THE OBJECTIVES OF WEALTH MANAGEMENT

- **We have listed the types of objectives you may wish to take into consideration:**
- Investment Planning. Determining Investment Temperament & Risk Tolerance. Setting Investment Goals. ...
- Retirement Planning. Targeting Retirement Age. Retirement Plan Selection and Design. ...
- Cash Flow Analysis. Identifying Income Sources.

TIPS TO START SAVING FOR YOUR CHILD'S COLLEGE EDUCATION

- Saving for college can seem overwhelming, but it doesn't have to be.
- This makes it ever more important to start thinking about college early.
- The best time to start is when your child is born, but if you haven't started yet, we'll also cover ways to catch up on savings.

SITUATION, COMPLICATION, IMPLICATION, ACTION & BENEFIT

- Set a monthly savings goal year one.
- Look for savings vehicles that will maximize returns
- Ask family members to contribute part of their gift budget to your student's college
- Treat your child's college fund like **Don't touch it!**
- Consult a trusted financial advisor today

ABSTRACT FOR START SAVING FOR YOUR CHILD'S COLLEGE EDUCATION

- Policy makers have developed several strategies to influence whether and how individuals save. Policy responses typically involve a combination of prudential regulation and consumer protection legislation, financial incentives, financial education and awareness initiatives, as well as behavioural techniques to encourage people into sound saving decisions

THANKING YOU