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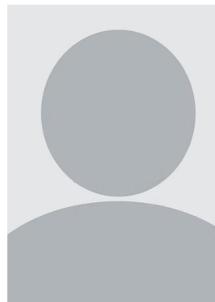


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James Fanning,
CFP, CRPC, ChSNC

LPL Financial Planner

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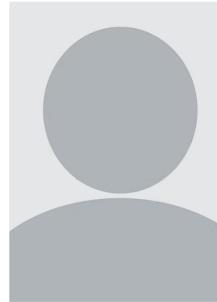
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James Fanning, CFP, CRPC, ChSNC

LPL Financial Planner

James E. Fanning, CFP, CRPC, ChSNC

James is a native of Fort Collins. His background includes a Finance degree with an emphasis in Personal Financial Planning from Colorado State University. He has also holds his Series 7, 66, and 24 securities registrations through LPL Financial as well as the State of Colorado Life and Health Insurance license. James is a Certified Financial Planner (CFP®), Chartered Retirement Planning Counselor (CRPC®), Chartered Special Needs Consultant (ChSNC®) and Securities Principal.

James is an avid sports fan and closely follows the Denver Broncos and Denver Nuggets. On the weekend James enjoys hiking and camping with his wife, Alex, and his dog, Trevi a Siberian Husky mix. He is also a part of the Special Olympics Young Professional Board, a group that organizes events and raises funds for Special Olympics Colorado.

James is entering his tenth year with Retirement and Estate Advisors. He specializes in Retirement and Special Needs financial planning, with a goal to build long term relationships with clients.



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Many realize it's important to save for retirement, but knowing exactly how much to save is another issue altogether.

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There are a variety of retirement planning options that could help meet your needs. Here are some of the most popular.

Greater demand is being placed on the Social Security system as the baby boom generation has begun to retire.

The Social Security Administration's retirement estimator gives estimates of your future benefits based on your actual Social Security earnings record.

There can be a substantial benefit to deferring taxes as long as possible.

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A sound cash management program uses a disciplined approach: accounting, analysis, allocation, and adjustment.

It's important to understand the options, such as financial aid grant programs, when having to pay for college.

If you have a family who relies on your income, it is important to have life insurance protection.

A business owner policy is an insurance package that assembles the basic coverages required by a business owner in one bundle.

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Company-owned life insurance is one way to help protect a business from financial problems caused by the death of a key employee.



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How much retirement income will you need? How much life insurance is enough? What type of IRA is right for you?

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These calculators are hypothetical examples used for illustrative purposes and do not represent the performance of any specific investment or product. Rates of return will vary over time, particularly for long-term investments. Investments offering the potential for higher rates of return also involve a higher degree of risk of loss. Actual results will vary.

Retirement Plan Early Distribution Estimate how much would remain after paying income taxes and penalties if you took an early distribution from a retirement plan.	bg-3.f3628c4ef0ba39c7433d.jpg Calculator image file bg-3.f3628c4ef0ba39c7433d.jpg	bg-a3b5016203d381cdf6e.jpg Calculator image file bg-2.a3b5016203d381cdf6e.jpg
bg-1.c67de5ea4f165d3152105.jpg Calculator image file bg-1.c67de5ea4f165d3152105.jpg	Home Affordability Estimate of the maximum amount of financing you can expect to get when you begin house hunting.	bg-4.ab479a5ab92cf58fd3.jpg Calculator image file bg-4.ab479a5ab92cf58fd3.jpg
bg-3.aaa5514ddfbdbbd4c86e.jpg Calculator image file bg-3.aaa5514ddfbdbbd4c86e.jpg	bg-2.9b1d323fe5c7ae9791d7.jpg Calculator image file bg-2.9b1d323fe5c7ae9791d7.jpg	bg-1.b8e5ae722b3cb0d8e847.jpg Calculator image file bg-1.b8e5ae722b3cb0d8e847.jpg
Savings Goals How much do you need to save each year to meet your long-term financial goals?	bg-4.2ed36411c391c217f6ab.jpg Calculator image file bg-4.2ed36411c391c217f6ab.jpg	bg-3.a7155a37fcbd4a2f6e32.jpg Calculator image file bg-3.a7155a37fcbd4a2f6e32.jpg
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LTCI Cost of Waiting Estimate the potential cost of waiting to purchase a long-term care insurance policy.	bg-4.9937f6bbb2f0ab0c766e.jpg Calculator image file bg-4.9937f6bbb2f0ab0c766e.jpg	bg-3.c6b4555fb10934b8ddal.jpg Calculator image file bg-3.c6b4555fb10934b8ddal.jpg
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bg-2.37a190e02d989e12a7b2.jpg Calculator image file bg-2.37a190e02d989e12a7b2.jpg	bg-1.c4c3flfda64707759f6b.jpg Calculator image file bg-1.c4c3flfda64707759f6b.jpg	Life Insurance How much life insurance would you need to produce a sufficient income stream for your family?
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bg-1.24802d9221cedf08dd45.jpg Calculator image file bg-1.24802d9221cedf08dd45.jpg	Lifetime Earnings This calculator is designed to help you attach a dollar figure to your life's work.	bg-4.4dae2b2db2546c976706.jpg Calculator image file bg-4.4dae2b2db2546c976706.jpg
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bg-106f934a4fb162b569220.jpg Calculator image file bg-106f934a4fb162b569220.jpg	Cash Flow Analysis This Cash Flow Analysis form will help you weigh your income vs. your expenses.	bg-9.bb2c0659740c80d2fe6.jpg Calculator image file bg-9.bb2c0659740c80d2fe6.jpg
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bg-2.3e62015da125b9520104.jpg Calculator image file bg-2.3e62015da125b9520104.jpg	bg-1.3887bfa5f2226291890.jpg Calculator image file bg-1.3887bfa5f2226291890.jpg	Taxable Equivalent Yield Calculate the rate of return you would have to receive from a taxable investment to realize an equivalent tax-exempt yield.
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College Funding Use this calculator to estimate the cost of your child's education, based on the variables you input.	bg-5.263459fa83108e217e99.jpg Calculator image file bg-5.263459fa83108e217e99.jpg	bg-4.08b6721e17fa9d10187f.jpg Calculator image file bg-4.08b6721e17fa9d10187f.jpg
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Roth IRA Conversion This calculator can help you determine whether you should consider converting to a Roth IRA.	bg-5.2ed36411c391c217f6ab.jpg Calculator image file bg-5.2ed36411c391c217f6ab.jpg	bg-4.532e6c121b70a42c2d9.jpg Calculator image file bg-4.532e6c121b70a42c2d9.jpg
bg-3.6d2452f5703450dfc9d.jpg Calculator image file bg-3.6d2452f5703450dfc9d.jpg	bg-2.df227cc681f2e4394da5.jpg Calculator image file bg-2.df227cc681f2e4394da5.jpg	bg-1.5elab92cd1ec3cl2db1b.jpg Calculator image file bg-1.5elab92cd1ec3cl2db1b.jpg
IRA Eligibility Use this calculator to determine whether you qualify for the different types of IRAs.	bg-7.51f4ac5a40dc88e44f54.jpg Calculator image file bg-7.51f4ac5a40dc88e44f54.jpg	bg-6.73eb616fff662ac000.jpg Calculator image file bg-6.73eb616fff662ac000.jpg
bg-5.fdc49b0c738dbbb2cea7.jpg Calculator image file bg-5.fdc49b0c738dbbb2cea7.jpg	bg-4.e4d147c443a0ce53187.jpg Calculator image file bg-4.e4d147c443a0ce53187.jpg	bg-3.a21710a4fb24599290.jpg Calculator image file bg-3.a21710a4fb24599290.jpg
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bg-4.d4f5fc77fcd992dfced.jpg Calculator image file bg-4.d4f5fc77fcd992dfced.jpg	bg-3.23e20418f8dfdb982598.jpg Calculator image file bg-3.23e20418f8dfdb982598.jpg	bg-2.918c99337cf68a3398f8.jpg Calculator image file bg-2.918c99337cf68a3398f8.jpg
bg-1.f48d8abe602a4d460b3.jpg Calculator image file bg-1.f48d8abe602a4d460b3.jpg	Federal Income Tax This calculator can help you estimate your annual federal income tax liability.	bg-4.9bb2c0659740c80d2fe6.jpg Calculator image file bg-4.9bb2c0659740c80d2fe6.jpg
bg-3.abde9c049cd082bd0f7.jpg Calculator image file bg-3.abde9c049cd082bd0f7.jpg	bg-2.e1ff79a6d04d2167f55c.jpg Calculator image file bg-2.e1ff79a6d04d2167f55c.jpg	bg-1.77c4a38fb9f1e1fb88669d.jpg Calculator image file bg-1.77c4a38fb9f1e1fb88669d.jpg
Retirement Portfolio Lifespan How Long Will Your Funds Last?	bg-4.6303124c40b5c580018e.jpg Calculator image file bg-4.6303124c40b5c580018e.jpg	bg-3.ec83e09d315b3a15eb08.jpg Calculator image file bg-3.ec83e09d315b3a15eb08.jpg
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Glossary

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N P Q R S T U V W Y Z

Q

A
Adjusted Gross Income (AGI) An adjustment calculation in the computation of income tax liability. It is computed by subtracting certain allowable deductions from gross income.

Administrator A person appointed by the court to settle an estate when there is no will.

After-Tax Return The rate of return after the effects of taxes have been taken into account.

Aggressive Growth Fund A mutual fund whose primary investment objective is to obtain capital gains. The return and principal value of mutual funds fluctuate with changes in market conditions. Shares, when sold, may be worth more or less than their original cost. Mutual funds are sold by prospectus. Please consider the investment objectives, risk charges, and expenses carefully before investing. Mutual funds are sold by prospectus. Please consider the investment objectives, risk charges, and expenses carefully before investing. The prospectus, which contains the and other information about the investment company, can be obtained from your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

Alternative Minimum Tax A federal tax imposed on those individuals, trusts, and estates that do not pay all the taxes they owe because of certain deductions, credits, and exclusions. This was designed to ensure that individuals, trusts, and estates that have low taxable income do not get a break on their taxes.

Annual Benefit An insurance-based contract that provides future payments at regular intervals in exchange for current premiums. Premiums are paid annually. Benefits can be individual, company, organization, and so on. The benefit upon the death of the owner. A beneficiary can be an individual, company, organization, and so on.

Annual Contract An insurance-based contract that provides future payments at regular intervals in exchange for current premiums. Premiums are paid annually. Benefits can be individual, company, organization, and so on. The benefit upon the death of the owner. A beneficiary can be an individual, company, organization, and so on.

Annual Insurance Policy An insurance-based policy that provides future payments at regular intervals in exchange for current premiums. Premiums are paid annually. Benefits can be individual, company, organization, and so on. The benefit upon the death of the owner. A beneficiary can be an individual, company, organization, and so on.

Annualized Return The rate of return over a period of time that reflects the effect of compounding. Annualized return is calculated by dividing the total return by the number of years the investment has been held.

Asset Allocation The process of dividing assets in a portfolio to minimize potential return at a particular level of risk. This process is usually done using the historical performance of the asset classes within each investment.

Asset Class A group of investments with similar characteristics.

Audit The examination of the accounting and financial documents of a firm by an objective professional. The audit is done to determine the records' accuracy, soundness, and conformity to legal and accounting principles.

B

Balanced Mutual Fund A mutual fund whose objective is a balance of stocks and bonds. Balanced funds tend to be less volatile than stock-only funds. The return and principal value of mutual funds fluctuate with changes in market conditions. Shares, when sold, may be worth more or less than their original cost. Mutual funds are sold by prospectus. Please consider the investment objectives, risk charges, and expenses carefully before investing. Mutual funds are sold by prospectus. Please consider the investment objectives, risk charges, and expenses carefully before investing. The prospectus, which contains the and other information about the investment company, can be obtained from your financial professional. Be sure to read the prospectus carefully before deciding whether to invest.

Bear Market When the stock market appears to be declining overall, it is said to be a bear market.

Beneficiary A person named in a life insurance policy, annuity, will, trust, or other agreement to receive a financial benefit upon the death of the owner. A beneficiary can be an individual, company, organization, and so on.

Blue Chip Stock The common stock of a company with a long history of profitability and consistent dividend payments.

Bond A bond is evidence of a debt in which the issuer promises to pay the bondholders a specified amount of interest to repay the principal at maturity. Bonds are usually issued in multiples of \$2,000.

Book Value The net value of a company's assets, less its liabilities and the liquidation price on its preferred issues. The net asset value divided by the number of shares of common stock outstanding equals the book value per share, which may be higher or lower than the stock's market value.

Bull Market When the stock market appears to be advancing overall, it is said to be a bull market.

Buy-Sell Agreement A buy-sell agreement is an arrangement between two or more parties that obligates one party to buy the business and another party to sell the business upon the death, disability, or retirement of one of the owners.

C

Cash Dividend The payment of cash to shareholders.

Cash Surrender Value The amount that an insurance policyholder is entitled to receive when he or she discontinues coverage.

Certified Financial Planning™ Practitioner A professional financial planning designation granted by the American College (Irony Man), Inc. (Certified Financial Planning™ Practitioners are required to pass a comprehensive exam and meet other requirements to earn the designation.) Financial planners who earn the CFP® mark have completed a comprehensive curriculum in financial planning and ethics. CFP® is a registered trademark of the American College of Financial Planning, Inc. CFP® and CERTIFIED FINANCIAL PLANNING™ are registered trademarks of the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFA examination administered by the American Institute of Certified Public Accountants (AICPA) and has fulfilled the educational and professional experience requirements for initial certification.

Certified Public Accountant (CPA) A professional accounting designation granted by the American Institute of Certified Public Accountants (AICPA). The CPA examination is an examination of accounting knowledge and skills required to practice public accounting.

Charitable Lead Trust A trust established for the benefit of a charitable organization. A grantor who places money, securities, property, or other assets in a charitable lead trust receives an immediate tax deduction. The grantor also may qualify for an income tax deduction on the estimated present value of the remainder interest that will remain in the trust after the charitable organization receives the assets.

Charitable Remainder Trust A trust established for the benefit of a charitable organization. A grantor who places money, securities, property, or other assets in a charitable remainder trust receives an immediate tax deduction. The grantor also may qualify for an income tax deduction on the estimated present value of the remainder interest that will remain in the trust after the charitable organization receives the assets.

Chartered Financial Consultant (ChFC) A professional financial planning designation granted by the American College (Irony Man), Inc. (Chartered Financial Consultants are required to pass a comprehensive exam and meet other requirements to earn the designation.) Financial planners who earn the ChFC® mark have completed a comprehensive curriculum in financial planning and ethics. ChFC® is a registered trademark of the American College of Financial Planning, Inc. ChFC® and CHARTERED FINANCIAL CONSULTANT™ are registered trademarks of the Chartered Financial Analysts Institute, Inc. These marks are awarded to individuals who successfully complete the CFA examination administered by the American Institute of Certified Public Accountants (AICPA) and has fulfilled the educational and professional experience requirements for initial certification.

Chartered Life Underwriter (CLU) A federal law requiring employers with more than 200 employees to provide health insurance coverage to their employees. The employer must provide coverage to all full-time employees, part-time employees, and dependents.

Charitable Contribution Deduction A deduction for contributions made to qualified charitable organizations.

Charitable Contribution Receipt Statement A statement provided by a charitable organization that details the amount of the contribution and the tax deduction claimed by the donor.

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By taking steps in advance, you have a greater say in how these questions are answered. And isn't that how it should be?

Wills and trusts are two of the most popular estate planning tools. Both allow you to spell out how you would like your property to be distributed, but they also go far beyond that.

Just about everyone needs a will. Besides enabling you to determine the distribution of your property, a will gives you the opportunity to nominate your executor and guardians for your minor children. If you fail to make such designations through your will, the decisions will probably be left to the courts. Bear in mind that property distributed through your will is subject to probate, which can be a time-consuming and costly process.

Trusts differ from wills in that they are actual legal entities. Like a will, trusts spell out how you want your property distributed. Trusts let you customize the distribution of your estate with the added advantages of property management and probate avoidance. While trusts offer numerous advantages, they incur upfront costs and ongoing administrative fees. The use of trusts involves a complex web of tax rules and regulations. You should consider the counsel of an experienced estate planning professional and your legal and tax advisers before implementing such strategies.

Wills and trusts are not mutually exclusive. While not everyone with a will needs a trust, all those with trusts should have a will as well.

Incapacity poses almost as much of a threat to your financial well-being as death does. Fortunately, there are tools that can help you cope with this threat.

A durable power of attorney is a legal agreement that avoids the need for a conservatorship and enables you to designate who will make your legal and financial decisions if you become incapacitated. Unlike the standard power of attorney, durable powers remain valid if you become incapacitated.

Similar to the durable power of attorney, a health care proxy is a document in which you designate someone to make your health care decisions for you if you are incapacitated. The person you designate can generally make decisions regarding medical facilities, medical treatments, surgery, and a variety of other health care issues. Much like the durable power of attorney, the health care proxy involves some important decisions. Take the utmost care when choosing who will make them.

A related document, the living will, also known as a directive to physicians or a health care directive, spells out the kinds of life-sustaining treatment you will permit in the event of your incapacity. The directive creates an agreement between you and the attending physician. The decision for or against life support is one that only you can make. That makes the living will a valuable estate planning tool. And you may use a living will in conjunction with a durable health care power of attorney. Bear in mind that laws governing the recognition and treatment of living wills may vary from state to state.



Estate Planning Tip

“ Keep all your important financial and legal information in a central file for your executor.

Be sure to include:

- letters of last instructions
- medical records
- bank/brokerage statements
- income and gift tax returns
- insurance policies
- titles and deeds
- will and trust documents

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Wills and trusts allow you to spell out how you would like your property distributed, but they also go beyond that.

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There are a variety of retirement planning options that could help meet your needs. Here are some of the most popular.

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Greater demand is being placed on the Social Security system as the baby boom generation has begun to retire.

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A sound cash management program uses a disciplined approach: accounting, analysis, allocation, and adjustment.

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It's important to understand the options, such as financial aid grant programs, when having to pay for college.

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Company-owned life insurance is one way to help protect the death of a key employee.

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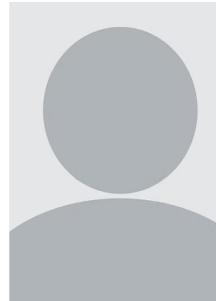


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James Fanning, CFP, CRPC, ChSNC

LPL Financial Planner

James E. Fanning, CFP, CRPC, ChSNC

James is a native of Fort Collins. His background includes a Finance degree with an emphasis in Personal Financial Planning from Colorado State University. He has also holds his Series 7, 66, and 24 securities registrations through LPL Financial as well as the State of Colorado Life and Health Insurance license. James is a Certified Financial Planner (CFP®), Chartered Retirement Planning Counselor (CRPC®), Chartered Special Needs Consultant (ChSNC®) and Securities Principal.

James is an avid sports fan and closely follows the Denver Broncos and Denver Nuggets. On the weekend James enjoys hiking and camping with his wife, Alex, and his dog, Trevi a Siberian Husky mix. He is also a part of the Special Olympics Young Professional Board, a group that organizes events and raises funds for Special Olympics Colorado.

James is entering his tenth year with Retirement and Estate Advisors. He specializes in Retirement and Special Needs financial planning, with a goal to build long term relationships with clients.



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Our financial newsletters are designed to provide helpful information on a wide variety of financial topics. Simply click on one of the newsletter topics below to read the article in its entirety.

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Articles

Welcome to our research center! We've put together a library of information on important financial topics that we believe you'll find helpful.

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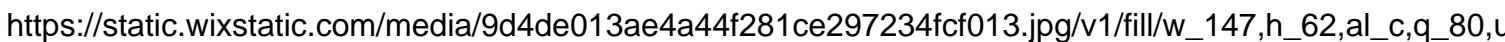
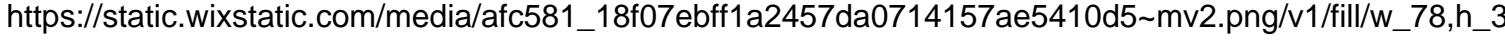
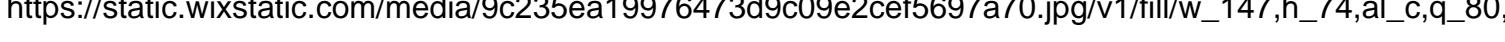
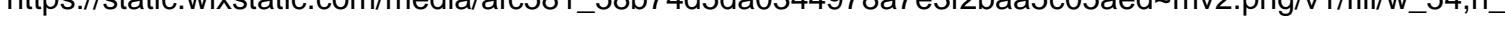
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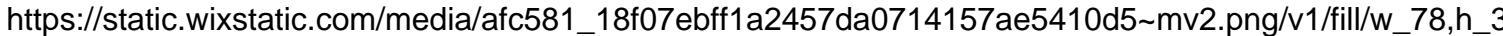
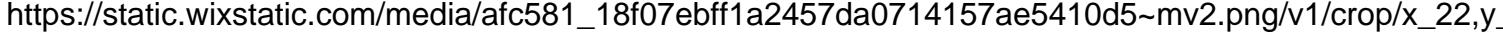
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