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# TRIBECA FINANCIAL PLANNING



## Budget Planning

Families and individuals have varying financial planning needs. While many people want a comprehensive analysis to be assured of their financial strength or to address any weaknesses, others want assistance with a specific part of their finances. Tribeca Financial Planning works closely with clients in order to fully under- ▶

## Investment Planning

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## Retirement Planning

Seniors individuals have varying financial planning needs. While many people want a comprehensive analysis to be assured of their financial strength or to address any weaknesses, others want assistance with a specific part of their finances. Tribeca Financial Plan- ▶

## Estate Planning

Families and individuals have varying financial planning needs. While many people want a comprehensive analysis to be assured of their financial strength or to address any weaknesses, others want assistance a specific part of their finances. Tribeca Financial Plan- ▶



## OUR PROCESS

Starting a child's college fund. Saving to buy a home. Deciding how child's college fund. Saving to buy a home. Deciding how to structure a new or existing business. Planning for retirement. Shepherding an inheritance. Providing for a life partner. Planning for your family's future without you. new or existing business. Planning for retirement. Shepherding an inheritance. Providing for a life partner. Planning for your family's future without you. Let TRIBECA FINANCIAL guide your choices.

## WHY CHOOSE A CFP?

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## DISCLOSURE

### IMPORTANT CONSUMER DISCLOSURE

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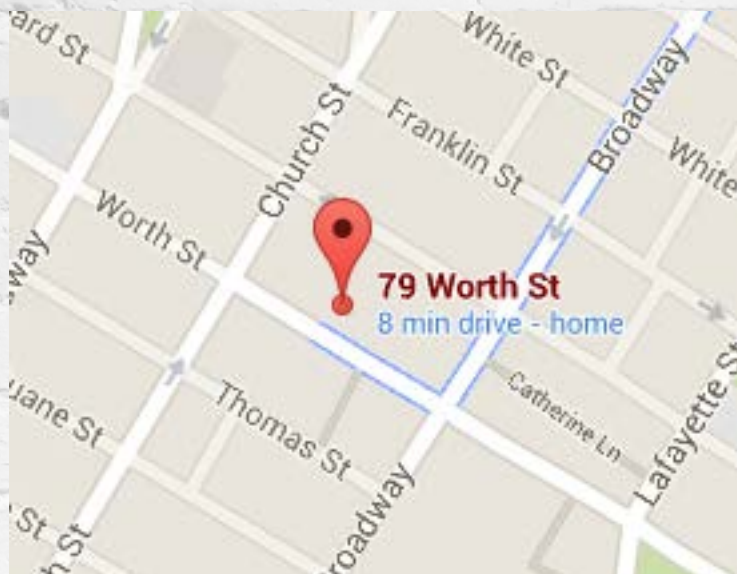
## DIRECTIONS | CONTACT | ABOUT

**ROBERT J. INCE**, Principal of Tribeca Financial Planning, is a Certified Financial Planner and Chartered Financial Analyst. He has over twenty years of Wall Street experience as a financial analyst and portfolio manager. He holds a Master of Arts Degree in Economics from Fordham University and a Bachelor of Arts Degree in English from the University of Maryland.



## TRIBECA FINANCIAL PLANNING

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DIRECTIONS: Subway Take x to x  
Bus: Take the M00 to x



## BUDGET PLANNING

### To establish a gifting program.

One of the easiest methods of estate reduction is to gift assets to those who will inherit them. Gifted assets are removed from the estate. Additionally, the entire gift or some portion of it may be reported in the transfer tax system, it is one of the most powerful estate planning techniques. The strategy has you. If so, we'll the numbers, to transfer the business to their children and for grandparents interested in assisting with college tuition.

### To avoid or limit the assets subject to probate.

This transference takes time passing through the court system and includes lawyers, appraisers, tax than one probate process. Astute planning can reduce the time and administrative expense involved.

### To avoid leaving some or all of your assets intestate.

Disposition is made by a court, according to state inheritance laws and possibly under the auspices of a court-appointed executor. As incongruous as it sounds, this could result, for example, in your stepson's mother's parents inheriting your grandmother's heirloom necklace, instead of your sister.



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## RETIREMENT PLANNING

### Preparing for the future.

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