

## Weingarten Associates Ongoing Management Services

						
Retirement	Investments	Taxes	Wealth Transfer	Estate	Insurance	Cash Flow
Retirement Goal Setting	Diversified Asset Allocations	Tax Return Preparation	Tax-Efficient Gifting	Estate Document Reviews	Life Insurance Needs Analysis	Income & Expense Reviews
Social Security Planning	Withdrawal Strategies	Tax Projection	Charitable Strategies	Estate Guidance	Long-Term Care Analysis	Expense Management
Cash Flow Analysis	Investment Policy Statements	Tax-Efficient Investing	529 Plan Savings	Estate Tax Mitigation	Property & Casulty Review	Liability Review
Accumulation Planning	Triggered Rebalancing	Tax Loss Harvesting	Generational Planning	Beneficiary Management	Health Insurance Review	Emergency Funds
IRA & Roth Contributions	Evidence-Based investing	Roth Conversion Projections	Roth Conversions	Pasword Management		Cash Flow Automation
Employer Plans	Cost-Effective Investments	RSU/Stock Option Analysis		Trust Implementation		
RMD Planning	Account Consoliation	Gain/Loss Planning				
Pension Analysis						
Bucket List Goals						