VETWORTH

Onboarding Year Meetings/Topics

STUDENT LOAN ANALYSIS

A one hour consultation with a Student Loan Planner™ consultant to get a better handle on your debt

INSURANCE REVIEW

Ensuring proper insurances are in place along with adequate coverage amounts

ESTATE PLANNING

Reviewing estate documents for proper asset titling, listing beneficiaries, and guardianship

CASH FLOW REVIEW

Analysis of current cash flow including how to best save, structure debt, and plan ahead

GOALS VISUALIZATION

Real financial planning is personalized, and understanding your goals is necessary to prepare a cohesive financial plan

TAX PLANNING & STRATEGY

Taxes are involved in every financial decision which is why we place a large emphasis on proper tax planning

SAVINGS STRATEGY & RETIREMENT PLANNING

Thorough projection of retirement sustainability and the recommended next steps to take

INVESTMENT STRATEGY

Household investment recommendations based on individualized goals, time horizon, and risk tolerance