



WOLFGANG

CAPITAL®

Focused on five key areas of your financial life, our comprehensive Whole Picture Retirement Plan® is designed to help our clients achieve simplicity and security during their retirement years.

WE LISTEN



VALUES
CONCERNS
LEGACY GOALS
RISK TOLERANCE
LONG TERM PLANS
INCOME & GROWTH GOALS

WE LOOK



INFLATION
LIFE STAGES
INCOME GAPS
RISK VS. REWARD
LONG RANGE OUTLOOK
WHAT'S FITTING FOR THE FAMILY?

WE CARE



COST ANALYSIS
TEAM APPROACH
ROUTINE CLIENT REVIEWS
COMMUNITY CHARITY WORK
SUPPORT FOR LIFE CHANGES
CONSISTENT COMMUNICATION

WHOLE PICTURE RETIREMENT PLAN®

1 INCOME PLANNING

Establish an income plan to help secure your future & support your lifestyle.

1

PENSION PLANNING
SPOUSAL CONTINUATION
SOCIAL SECURITY PLANNING
PASSIVE & INVESTMENT INCOME
REQUIRED MINIMUM DISTRIBUTIONS

2

2 INVESTMENT PLANNING

A diversified investment plan designed to help meet your goals & minimize risk.

RISK ASSESSMENT
IRA & 401K PLANNING
VOLATILITY EXPOSURE
INVESTMENT MANAGEMENT
ASSET CLASS DIVERSIFICATION

3

3 TAX STRATEGIES

Consider your long term tax positioning to help optimize exposure.

CHARITABLE GIVING
TAX EFFICIENT VEHICLES
TAX DEFERRED ACCOUNTS
TAX PREPARER REFERRALS
ROTH CONVERSION ANALYSIS

4

4 HEALTHCARE PLANNING

Take comfort in knowing your health & estate may be safe in a time of need.

HEALTH INSURANCE*
SUPPLEMENTAL INSURANCE*
MEDICARE PLAN SELECTION*
LONG TERM CARE PLANNING*
MEDICARE PLAN ADJUSTMENTS*

5

5 LEGACY PLANNING

Help preserve your family's comfort & security with a thoughtful plan.

SURVIVOR ASSESSMENT
LIFE INSURANCE BENEFITS*
BENEFICIARY DESIGNATIONS
ESTATE ATTORNEY REFERRALS
SUCCESSION PLAN & TRANSFERS

* Insurance products and services are offered through Wolfgang Financial Group LLC dba Wolfgang Financial and Insurance Agency (CA LIC # OK07551).

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