

Integrity, expertise, accountability, confidentiality - they're all good reasons to count on us as your trusted advisor. You can depend on us for accurate evaluations and impartial advice. When it comes to balancing your financial and lifestyle goals, **Lifestyle Services** offers a comprehensive, tailored approach for your changing needs.

## LIFESTYLE SERVICES

### TRADITIONAL SERVICES

- Financial planning\*
- Retirement planning
- Estate and legacy planning
- Tax preparation
- Investment advisory services\*

### PERSONAL SERVICES

- Record keeping
- Bill paying
- Budgeting
- Managing expenses
- Bank statement reconciliation
- Monitoring income, investments and expenses
- Compiling important records
- Referrals for outside services
- Partnerships with other professionals
- Communication with loved ones

### CONSULTING SERVICES

- Retirement issues
- Insurance issues
- Legal issues
- Daily living issues



\*Securities and Advisory Services Offered Through Commonwealth Financial Network, Member FINRA/SIPC, a Registered Investment Adviser



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## LIFESTYLE SERVICES



It means getting the most out of life!



## We do more - so you can do it all

You've got a great life - and you've worked hard to make it and keep it that way. Putting in the hours - saving - investing - planning: making the tough choices, the right choices... the best choices.

Yet some of your most important choices still lie ahead. Where will you live? How will you live? Will you be able to have the lifestyle you want? Preserve your freedom? Provide for your family?

That's what our **Lifestyle Services** is all about: helping you make the right choices, so you can live your life the way you like it.

Whether you're looking to manage your own affairs more easily and efficiently or to help someone you love make the most of their resources and choices, you'll find that **Lifestyle Services** offers you a better way to handle the business of life.



### Q. What is the benefit of Lifestyle Services to me?

**A.** **Lifestyle Services** is a unique, customized package of services designed to help you manage the business of life so you can maintain your lifestyle and financial independence. It means getting the most out of your life.

### Q. Will I be expected to pay for services I don't need?

**A.** Absolutely not. One of the strengths of **Lifestyle Services** is flexibility - we can tailor our services specifically to meet your individual needs.

### Q. Now that she's on her own, Mom has had a difficult time managing her accounts and assessing her long-term needs. I want to help her... can Lifestyle Services help us both?

**A.** Definitely! **Lifestyle Services** can be of special benefit for time-pressed families who want to help a loved one maximize and maintain their independence. **Lifestyle Services** is especially valuable in helping families come together to make sound, caring decisions.

## Special services to help you make your best choices - while easing your workload and worry

As we mature, the relationship between financial needs and lifestyle choices can become increasingly complex. As your **Lifestyle Services** professional, we can help you better see and understand the big picture, so you can make your best decisions in your retirement years.

Our training and expertise makes us uniquely qualified to offer objective, accurate assessments of our client's resources and how they are managed. So, we're a logical source for mature adults to turn to for expert, confidential assistance in meeting challenges and making choices.



## Expert, impartial advice for the prime of your life.

Wide-ranging, informed, impartial advice from someone you can trust - that's exactly what we offer with **Lifestyle Services**.

More time to call your own - and more peace of mind. Find out how our **Lifestyle Services** can make a difference for you. Call us today for more details.



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