

Personalized Blue Chip Services

“The New Standard in Wealth Management”

At Westfield Financial Planning, clients come first!

Our approach to delivering comprehensive financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver a customized plan along with your personal *Financial Action Checklist*. Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment planning, tax reduction planning, retirement income and distribution planning, and family wealth planning.

We then schedule to meet with you on a regular basis to discuss and update your financial situation. We pride ourselves in our constant calendars of client services and regular client communications to keep you informed of economic news and appropriate tax law and estate planning rule updates. **As we said earlier, at Westfield Financial Planning, clients come first!**

Some of the ways we differ from other firms include:

- Our strong menu of *Blue Chip Services* which include a comprehensive review of: your tax reduction strategies; estate plans; investment plans; and retirement plans.
- Our frequent and regularly scheduled meetings with clients to update your specific plans and discuss your personal situations.
- Our strong and consistent calendar of high quality newsletters, tax reports, and other reports and articles.
- Our frequent schedule of client educational and appreciation events.
- Our personal service that features our best and most current ideas, suggestions and solutions.



Compare our list of *Blue Chip Services* to the services you receive today.

Your Firm WFP

Investment “Watch Dog” Service

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|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Reviewing your investments and designing a personalized portfolio appropriate to your needs |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Continual monitoring of your investments |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your portfolio |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Quarterly Statements |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Independent Advice |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Recommendations regarding allocations within your employer provided retirement plans such as 401(k)s |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Aggregation of all your accounts to simplify and reduce paperwork |

Tax Reduction Planning

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|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Quarterly review of your tax situation and planning to incorporate any new tax law changes |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Complimentary consultation with your tax preparer |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Recommendations of tax solutions including tax advantaged investments |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Staying up-to-date on and presenting new tax laws that can affect your situation |

Retirement Income & Distribution Planning

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|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Analysis of your income needs now and in the future |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Analysis of potential estate tax liabilities |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Recommendations regarding the most appropriate distribution strategy for your employer retirement plans & IRAs |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Analysis of the beneficiaries of your IRAs |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Review the possibilities of converting to a Roth IRA |

Family Wealth Planning

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|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Analysis of your current estate plan and concerns |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Complimentary consultation with your attorney |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Assistance in transferring assets to your Living Trust or other trusts |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Providing guidance with the appropriate and necessary steps in the event of the death of a loved one |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Review of beneficiary designations and asset titling |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Review of your long-term care needs. |

Client Services & Communications

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|--------------------------|-------------------------------------|---|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Quarterly Newsletter to keep you apprised of the most current planning options |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Quarterly, semi-annual or annual reviews |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Special reports on how to help reduce your taxes and other important topics |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Special Blue Chip Service Events (including client education and appreciation events) |