Decisive Wealth Management

Our Value to You and Your Family

Investment Planning	Estate Planning and Charitable Giving	Retirement Planning	Risk Management and Insurance	Cash Flow and Budget	Assistance to Loved Ones	Income Tax Planning
Review of Portfolio	Wills	Retirement Goal Setting	Review of Existing Policies	Income Sources	Gifting	Review of Cost-Basis
Asset Allocations	Power of Attorney	Social Security and Medicare	Life Insurance Needs	Expenses and Budgeting	Education Planning	Review Realized Gains
Time Horizon	Health Care Proxy	Business Planning	Long Term Care Insurance	Debt Management	Caring for Elderly	Carry Forward Losses
Withdrawal Strategies	Trusts	IRA Contributions and Conversions	Disability Insurance	One-Time Expenses	529 College Savings Plan	Tax Loss Harvesting
Review Investments Held Outside of Firm	Estate Taxes	Employer-Sponsored Plans and 401(k)'s	Health Insurance	Emergency Funding	Roth IRA's for Children	Deductions and Credits
Rebalancing	Guardian for Minor Children	Annuities and Pensions	Homeowner's or Renter's Insurance	Mortgage Review	UGMA/UTMA	Potential Roth Conversions
Dollar Cost Averaging	Charitable Giving	RMD's and Withdrawal Strategies	Liability Coverage			Health Savings and Flexible Spending Accounts
Risk Profiling		Self-Employment Retirement Plans				

And Always Answering Your Most Important Questions Throughout the Year!

Decisive Wealth Management *300 Metro Center Blvd, Suite 275 * Warwick RI 02886 * Phone 401-921-4150 * Fax 401-921-4152 * www.decisivewealthmanagement.com