

TAKING CONTROL OF YOUR FINANCIAL LIFE



Tax Planning, Estate Planning and Investments

At Wealth Enhancement Group, we know that one of the key aspects of financial planning is recognizing what's within our control, and how we can plan around it for improved outcomes. We can focus on these areas to create a plan that aligns with your values and goals. Our team will work with you to optimize these three core components: tax planning, estate planning and investments.

TAX PLANNING



A financial plan with built-in tax flexibility will give you choices about where to withdraw money and how much you're taxed in retirement.

- Create tax diversification now to create flexibility later.
- Spread out your assets between tax-deferred, taxable and tax-advantaged investments.
- Plan ahead to make sure you have enough cash to pay your taxes – your income sources will change in retirement.

ESTATE PLANNING



An estate plan should protect your legacy and ensure your values and goals are met. Review it regularly to create smooth transitions for your beneficiaries.

Foundational estate planning documents include:

- Will
- Trust
- Durable power of attorney
- Beneficiary designations
- Health care power of attorney
- Letter of intent

You might need to choose a Trustee to manage your estate. Wealth Enhancement Group offers this service.

INVESTMENTS



An all-weather portfolio supports financial decisions that align with your long-term plan. Our investment philosophy follows four core pillars:

- Effective diversification
- Active management
- Cost efficiency
- Tax efficiency

Our team of Roundtable™ specialists can help you build a comprehensive plan that covers these three main areas. Talk to your Financial Consultant to learn more about working with us.