Financial Planning

KINNECT ADVISORS: EXPERT FINANCIAL PLANNING INCLUDED WITH YOUR LEGAL PLAN

Financial Plan
Receive a comprehensive financial plan tailored to your unique goals and circumstances.

Financial Advisor
Enjoy virtual consultations and continuous support from your personal financial advisor.

Goal Tracking Platform
Pursue your financial goals with personalized insights and recommendations.

INCLUDED SERVICES

Investment Planning
- Audit your current portfolios and objectives
- Design an asset-allocation strategy
- Implement individualized investment strategies
- Access to non-proprietary investments across all asset classes

Protection Planning
- Life, health and disability Insurance review and implementation
- Long-Term Care Planning
- Property & Casualty insurance audit and placement
- Medicaid, Medicare and Special Needs Planning

Retirement Planning
- Design a retirement income strategy
- Maximize Social Security Income
- Simulate multiple retirement scenarios and take action
- IRA rollovers, Roth conversions and RMD Planning

Estate & Tax Planning
- Income Tax Planning
- Tax loss harvesting
- Tax reduction planning
- Wills, trusts, and estate tax planning
- Beneficiary and legacy planning

READY TO GET STARTED?

Call 1-800-728-5768 or email financialservices@kinnectadvisors.com to start your financial wellness journey today!

Legal Resources partners with ***Kinnect Advisors****, a financial advisory firm affiliated with Cetera, for advisory and management services. The phone number connects you with Legal Resources Member Services. This team addresses inquiries related to Legal Resources services and facilitates service-related inquiries and referrals only. They do not provide financial advice or collect financial information. Any financial details should be shared exclusively with a licensed financial professional.*

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Financial planning service through Kinnect Advisors is included in your Legal Resources plan and provides comprehensive financial guidance at no additional cost. However, certain financial products, such as life insurance, annuities, and other investment-related products, may be subject to third-party fees. Legal Resources partners with Kinnect Advisors for advisory and management services. Any decisions regarding third-party products should be made with a full understanding of their terms and costs.

COMPREHENSIVE FINANCIAL PLANNING
Included with Your Legal Resources Plan

From retirement and tax strategies to insurance reviews and estate planning **— expert guidance to help you make confident financial decisions.**

Building & Growth Wealth

- Asset allocation strategies
- Retirement accumulation & income planning
- IRA rollovers, Roth conversions & RMD planning
- Tax loss harvesting
- Income tax planning

Protect What Matters

- Life, health & disability insurance review
- Property & casualty audit
- Long-term care planning
- Protection planning & family security

Planning for Life Transitions

- Education planning / student loans
- Divorce financial planning
- Social Security planning
- Medicare, Medicaid & special needs planning

Everyday Financial Clarity

- Cash flow & budget planning
  Financial analysis & reports
- Portfolio reviews
- Personal & family financial planning
- Basic estate planning

PREFERRED MEMBER PRICING FOR ADVANCED PLANNING

Legal Resources members receive 25% off advanced services such as:

- Multi-generational estate planning
- High-net-worth legacy planning (over $4M net worth)