American Private Wealth
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Answering the Financial Questions that Count

The topics listed below are intended to cover a variety of situations--more than any one household will ever likely need to consider. All of the information available is offered to help you understand your current financial situation and make informed decisions. Simply fill out the form (online or on paper) and return it to request information on the subjects that interest you.

Send information on checked items to:

Name____

E-mail____

Address____

City____

State______________ ZIP Code_____________________

Business phone______________________________________

Home phone____

Best time to call______________________________________

Business Planning

- ☐ Starting or Buying a Business
- ☐ Choosing a Business Entity
- ☐ Business Insurance
- ☐ Business Tax Planning
- ☐ Retirement Plan Options
- ☐ Business Succession

Personal Finance

- ☐ Budgeting and Cash Reserves
- ☐ Establishing or Maintaining Credit
- ☐ Credit Cards
- ☐ Homeownership
- ☐ Buying or Leasing a Car
- ☐ Identity Theft

Insurance Planning

- ☐ Protecting Your Loved Ones with Life Insurance
- ☐ Estimating Your Life Insurance Needs
- ☐ What Type of Life Insurance Is Best for You?
- ☐ Creating an Estate Plan with Life Insurance
- ☐ Long-Term Care Options
- ☐ Financial Impact of a Disability

Education Planning

- ☐ Saving for College
- ☐ 529 Plans
- ☐ Financial Aid
- ☐ Student Loans
- ☐ Repaying Student Loans
- ☐ Education Tax Credits and Deductions

Estate Planning

- ☐ Wills and Trusts
- ☐ Planning for Incapacity
- ☐ Creating and Preserving a Family Legacy
- ☐ Using Life Insurance in Estate Planning
- ☐ Strategies to Minimize Estate Taxes
- ☐ Charitable Gifting Strategies

Retirement Planning

- ☐ IRAs
- ☐ Employer-Sponsored Retirement Plans
- ☐ Annuities
- ☐ Strategies for Retirement Plan Distributions
- ☐ Saving for Retirement
- ☐ Planning for Income in Retirement

Social Security and Medicare

- ☐ Understanding Social Security
- ☐ Social Security Retirement Benefits
- ☐ Social Security Disability Benefits
- ☐ Medicare
- ☐ Medicare Prescription Drug Coverage

Tax Planning

- ☐ Income Tax Planning
- ☐ Year-End Tax Planning
- ☐ Investment Tax Planning
- ☐ Alternative Minimum Tax (AMT)
- ☐ Gift and Estate Taxes

Other

If you want information about something not listed here, tell us below what you are looking for.

Investment Planning

- ☐ Investing Basics
- ☐ Setting Investment Goals
- ☐ Designing and Managing an Investment Portfolio
- ☐ Handling Market Volatility
- ☐ Asset Allocation and Diversification
- ☐ Taxable vs. Tax-Free Investing
- ☐ Stocks
- ☐ Bonds
- ☐ CDs
- ☐ Mutual Funds/ETFs
- ☐ Separately Managed Accounts

Life Events

- ☐ Buying a Home
- ☐ Getting Married
- ☐ Raising a Family
- ☐ Child with Special Needs
- ☐ Changing Jobs
- ☐ Starting a Business
- ☐ Caring for an Aging Parent
- ☐ Getting Divorced
- ☐ Death of a Family Member

IMPORTANT DISCLOSURES

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To the extent that this material concerns tax matters, it is not intended or written to be used, and cannot be used, by a taxpayer for the purpose of avoiding penalties that may be imposed by law. Each taxpayer should seek independent advice from a tax professional based on his or her individual circumstances.

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