

# PLUMTREE 360 FINANCIAL PLANNING

DELIVERS GUIDANCE ON EVERYTHING ABOUT YOUR MONEY

We help young professionals grow their wealth while moving through some of the most important and complex stages of their lives. Supporting you beyond the Core Comprehensive Financial to deliver the expertise you need, bringing in the right professional to help keep you on track to your goals.



## Spending, Saving & Investing

Save for tomorrow while you live for the NOW.



## Career

YOU are your greatest asset.  
Always be prepared to move ahead



## Tax, Insurance & Estate Planning

Protect what you've worked so hard for by keeping taxes as low as possible and planning for unexpected events.



## Large Purchases

New home, new car...We'll work with you through the process to determine a budget and make smart choices.



## Life Events

Major changes like a new job, new roommate or a marriage proposal call for changes in your plan



## Debt

Student loans, credit cards or mortgages. Some debt helps you build wealth, other debt holds you back.

**We meet a new challenge every day. Bring us yours.**

Visit us today at [www.plumtreefp.com](http://www.plumtreefp.com)

# PLUMTREE 360 FINANCIAL PLANNING

FREE YOURSELF UP TO WHAT'S IMPORTANT TO YOU

You're more than your investments.

All of your finances must work together to succeed, so we have partnered with a team of professionals to help you throughout the year and provide you an integrated and comprehensive financial plan.



## Financial Planning

Investment strategies  
Cash flow  
Goal based savings



## Legal Counsel

Estate planning  
Salary/contract negotiation  
Special needs planning



## Tax Planning

Personal taxes  
Business taxes  
Mid-year tax planning



## Insurance Planning

Healthcare  
Life insurance  
Auto & Home  
Disability  
Long-term care



## Career Development

Resume & LinkedIn  
Networking  
Job change

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