



ROOTED

PLANNING GROUP

What Services Does RPG Offer?

<ul style="list-style-type: none"> • Goal Defining and Planning 	<ul style="list-style-type: none"> • Long-Term Care Planning
<ul style="list-style-type: none"> • Investment Review and Implementation 	<ul style="list-style-type: none"> • Debt Management
<ul style="list-style-type: none"> • Insurance Review 	<ul style="list-style-type: none"> • Gift Planning
<ul style="list-style-type: none"> • Estate Review 	<ul style="list-style-type: none"> • College Planning
<ul style="list-style-type: none"> • Disaster Planning and Preparation 	<ul style="list-style-type: none"> • Student Loan Management
<ul style="list-style-type: none"> • Tax Planning and Preparation 	<ul style="list-style-type: none"> • Economic Outlook and Education
<ul style="list-style-type: none"> • Spending Plan and Implementation 	<ul style="list-style-type: none"> • Life and Disability Planning
<ul style="list-style-type: none"> • Employee Benefit Review 	<ul style="list-style-type: none"> • Divorce Planning
<ul style="list-style-type: none"> • Medicare Review 	<ul style="list-style-type: none"> • Relocation, Second Home and Travel Planning
<ul style="list-style-type: none"> • Social Security Analysis (start date) 	<ul style="list-style-type: none"> • Wealth Transfer Strategies
<ul style="list-style-type: none"> • Retirement Planning 	<ul style="list-style-type: none"> • Financial Literacy Education

What Makes RPG Different?

<ul style="list-style-type: none"> • You don't get an advisor, you get an ensemble team 	<ul style="list-style-type: none"> • Holistic financial advice tailored specifically to your goals and life's dreams
<ul style="list-style-type: none"> • Flat Fee 	<ul style="list-style-type: none"> • We want to know you, not just your digits
<ul style="list-style-type: none"> • No minimum assets required! 	<ul style="list-style-type: none"> • We celebrate, strategize and consult with you every step of the way on your wealth journey!