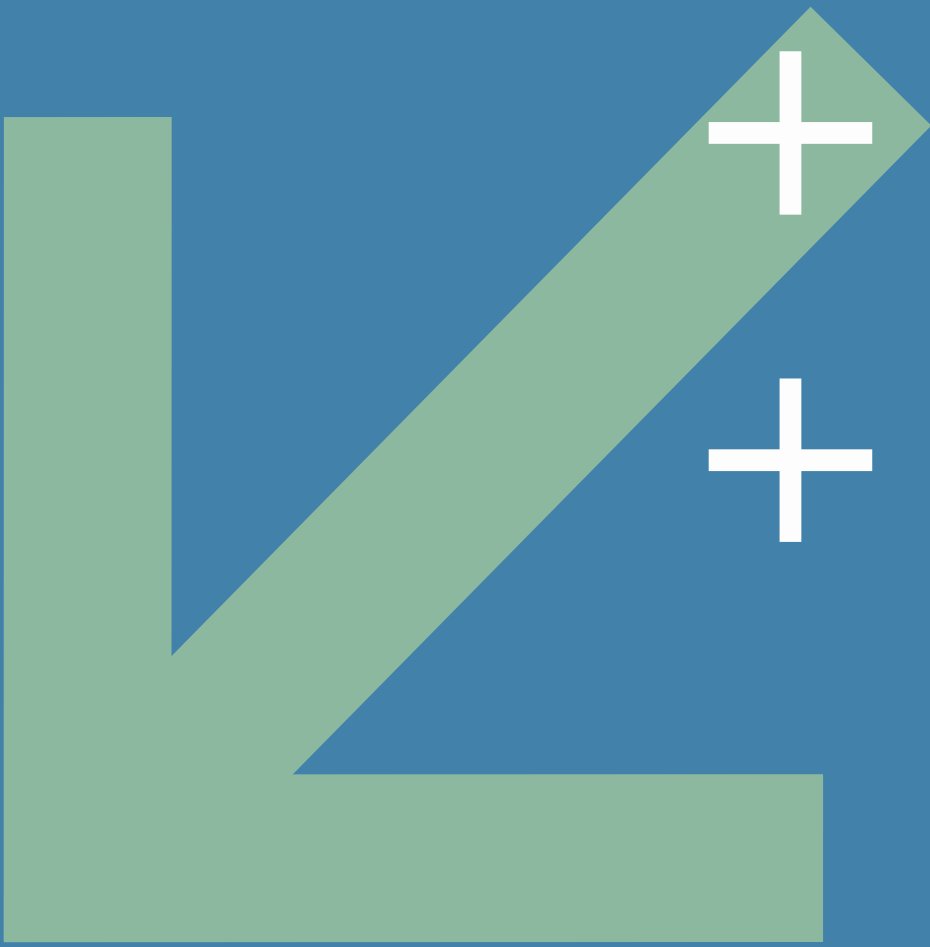


# CARLSON PLANNING COMPANY



Financial Planning  
and  
Investment Management



# PROBLEM

People's finances are consistently ranked as the leading cause of stress. Almost two thirds of Americans feel stressed about money\*.

## Why Though?



## UNORGANIZED

Staying organized and on top of all your financial documents can be a challenge.



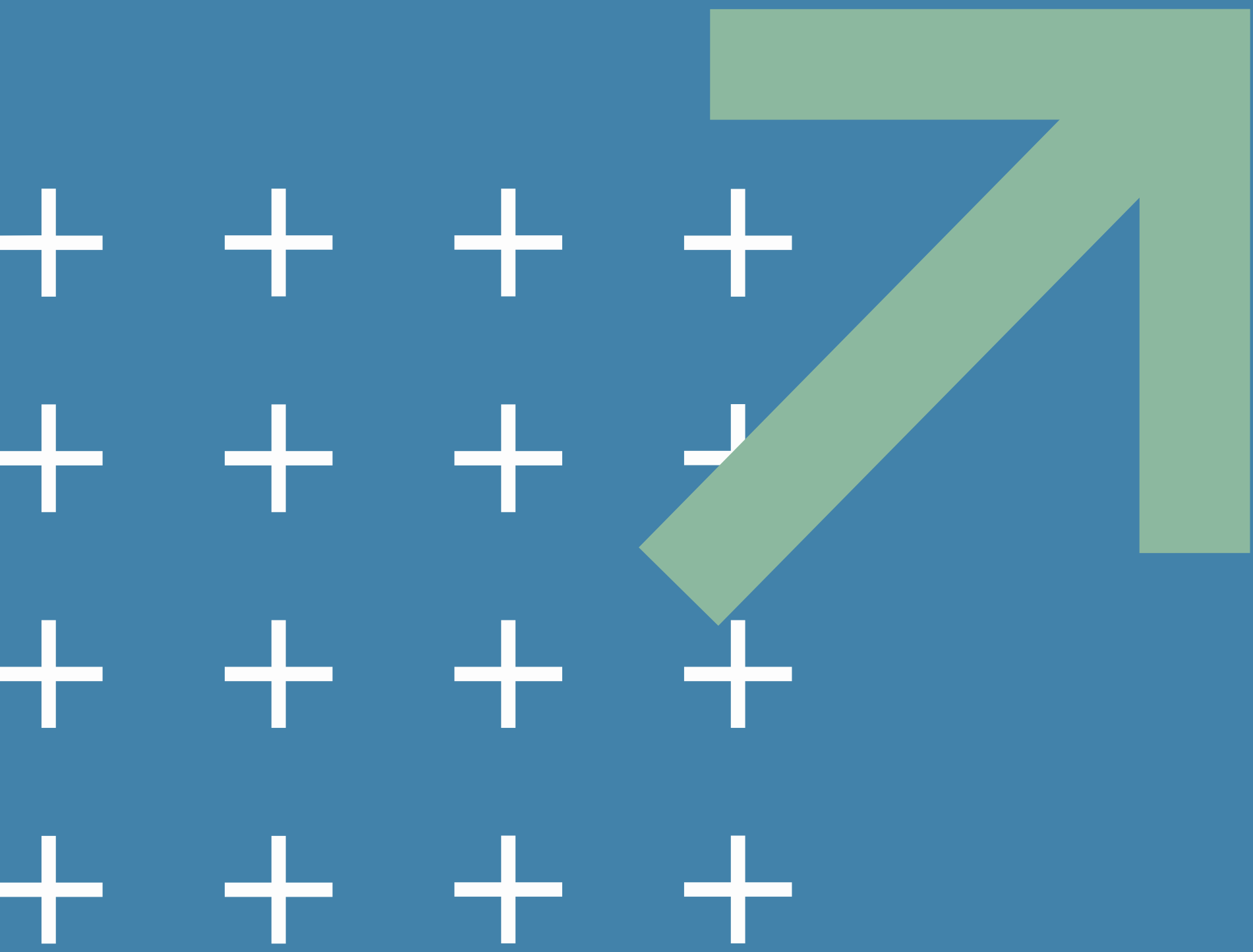
## UNDERFUNDED

Americans on the whole need to save more; rather than telling you to save more, we need to roll up our sleeves and plan together.



## OVERWHELMED

Finances can be tricky. There are a lot of moving parts. Don't worry, that's why we're here.



# SOLUTION

We've heard you. Everything we do is designed around your peace of mind.



## GET ORGANIZED

No matter where you are in life, we all need to start on the same page. We offer a 90-Minute Get Organized Meeting. At the end of it, you'll know what you have, what you owe and where all your accounts are located.



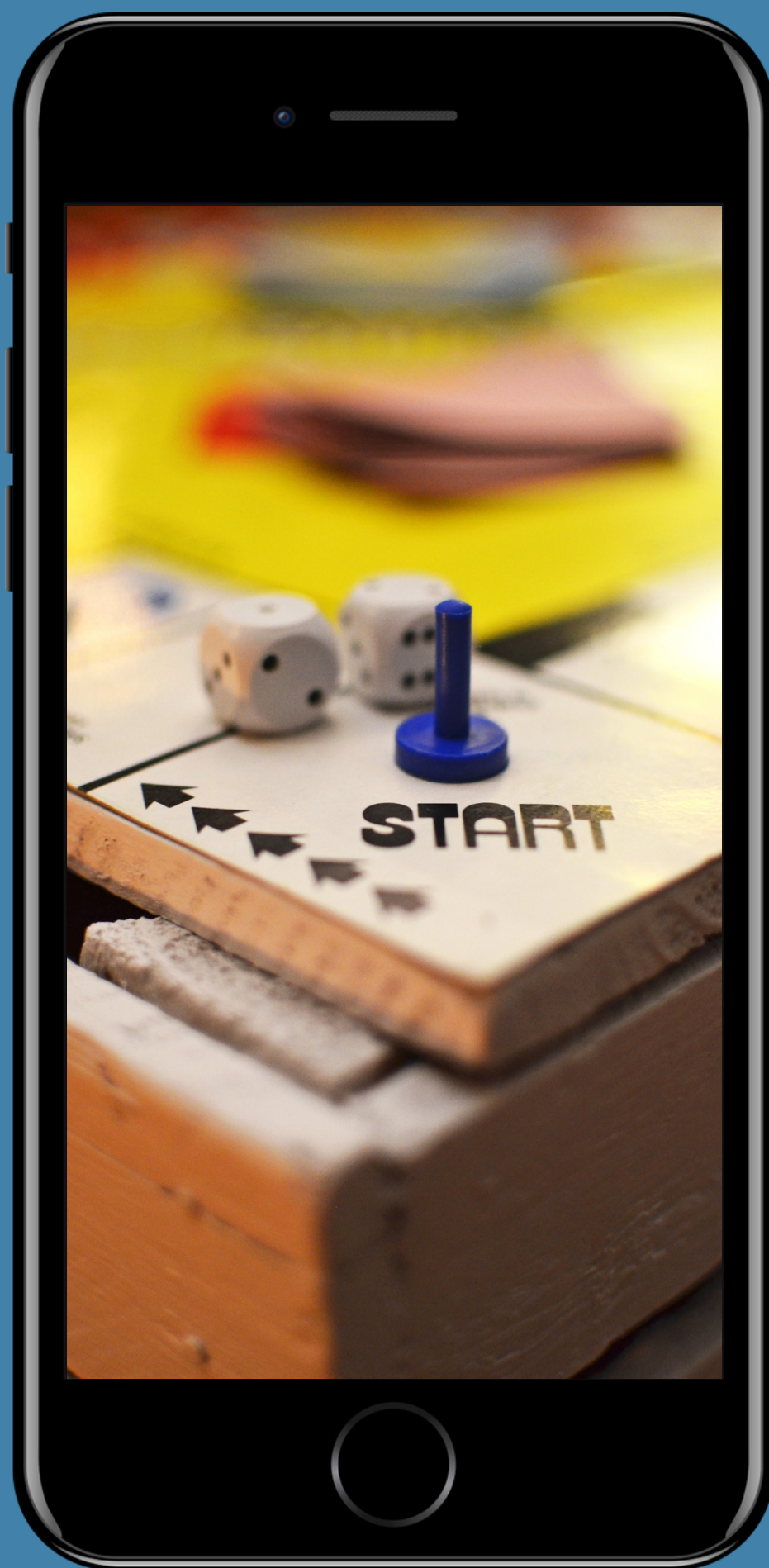
## AUTOMATE SAVINGS

Set your reoccurring savings up to pair with your paychecks. It sounds simple, but the interest compounds. That adds up over time, significantly.



## BREAK IT DOWN, SIMPLY

Financial Jargon is uncomfortable. We are here to break these complex topics down and have a simple conversation about the financial topics keeping you up at night.



# JUST START PLANNING

We've created a service that is designed to put you on the right track towards financial peace of mind.

# JUST START PLANNING

A two-meeting project-style engagement that covers the foundational financial planning topics.

## STEP 1 - GET ORGANIZED

90 Mins

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The purpose of this meeting is to help you get financially organized before we dive into creating your financial plan.

- **Organize** Paper Statements & Files
- **Gather** Missing Information
- **Setup** Online Account Access
- **Connect** Financial Accounts
- **Store** Virtual Files in Vault

## STEP 2 - GET ON TRACK

60 Mins

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The focus of our second meeting is to get on track. We will review our findings from our Get Organized Meeting and then chart a plan moving forward.

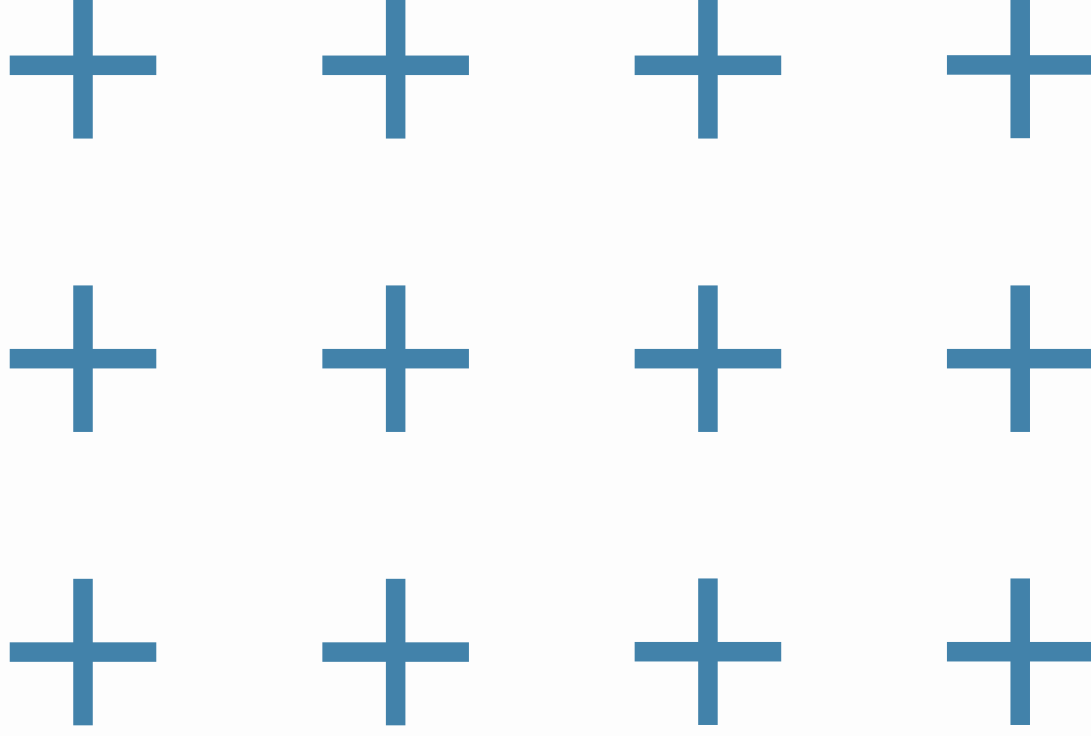
- **Setup** necessary investment accounts
- **Address** the financial planning To-Do's
- **Implement** investment strategy

# FINANCIAL PLANNING SUBSCRIPTION

For clients that want to be proactive about their financial health.







Financial Planning, when done right, is an ongoing commitment to your financial wellbeing. Some clients are comfortable with the package engagements. For clients that engage in a financial plan and would like a deeper continued engagement, we offer a financial planning subscription service.

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On a monthly basis, we will reach out with a new financial planning topic to discuss. Some of these topics will be helpful house cleanings like reviewing your insurance coverages; other topics will be for your time-sensitive financial matters like end-of-year tax planning or employee benefits open enrollment.

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Think of it like a gym membership; only an ongoing commitment to your financial health and wellbeing.

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# SERVICE SCHEDULE



## **Review your Savings**

Available & appropriate savings strategies



## **Review your Tax Returns**

Understand your sources of income and tax liability



## **Review your Investments**

Confirm your investments are working towards your goals



## **Review your Estate Plan**

An important and often overlooked part of financial planning



## **Review your Cash Flow**

A cash flow plan should support your lifestyle and goals



## **Review your Insurances**

Ensure you maintain the proper coverages and a fair price



## **End of Year Planning Opportunities**

Ensure you consider and take advantage of opportunities in the current year and beyond.



**Carlson Planning Co.**

Registered Investment Advisor

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# PUTTING IT OFF IS NATURAL.

**HERE ARE SOME NATURAL LIFE EVENTS THAT CAN PROMPT FINANCIAL PLANNING:**



## LIFE COMES QUICK

Freshly married, baby on the way? It's about time to start "Adulting" your finances. Let's review your emergency fund and insurance coverage.

**Pro Tip: If you're going to save for college, set up a college savings account before your baby shower.**



## NEW JOB, OLD JOB

Changing employers is a lot of work. It's important to help coordinate all of your employee benefits to make sure you're maximizing your compensation package at your new job.

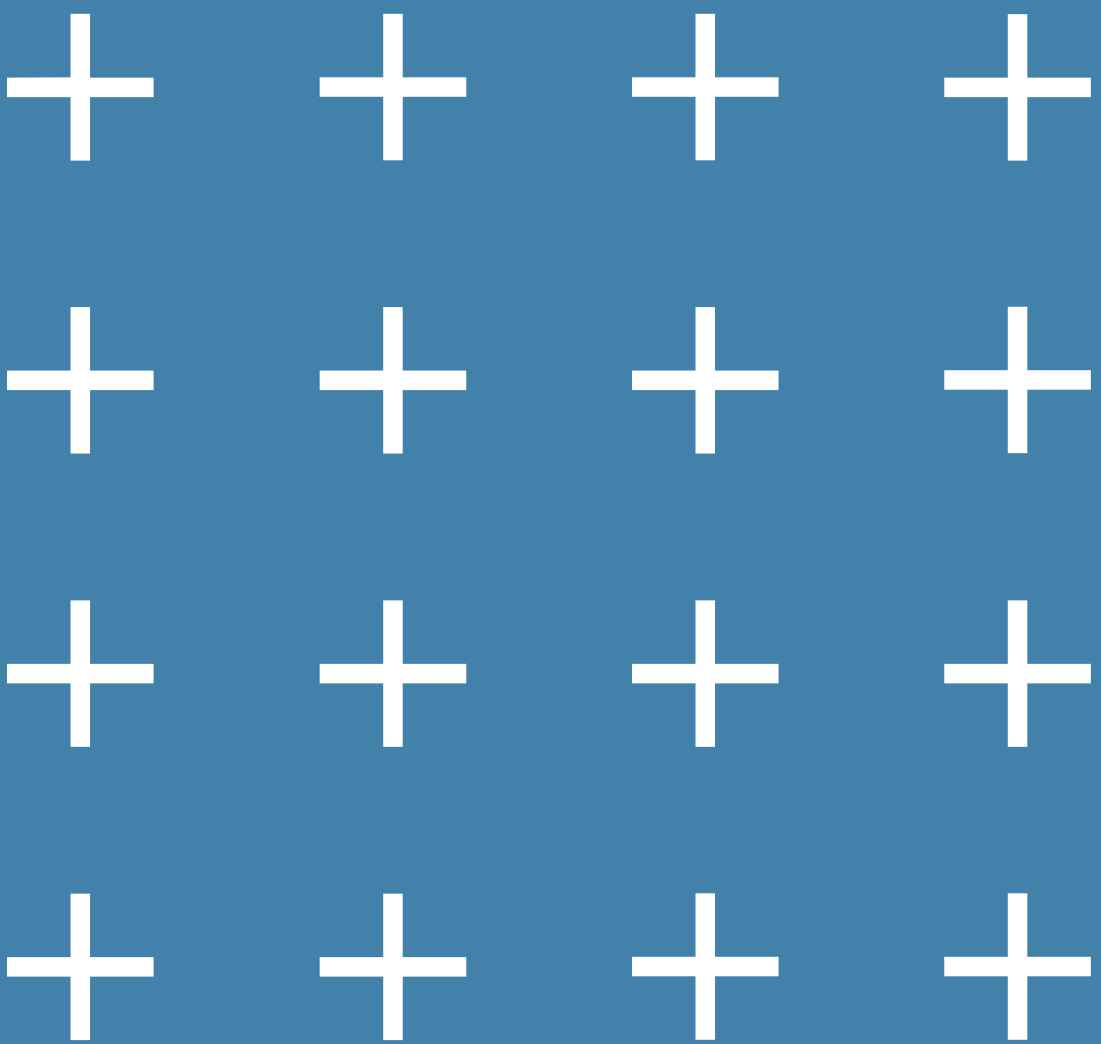
# MEET YOUR PLANNER



**JAMES E. CARLSON**  
Financial Planner

I'm an experienced financial planner and investment advisor representative with competencies in investment management, college funding planning and retirement planning. As an investment advisor representative, I help clients build personalized portfolios tailored to their goals, timeline, and investment preferences.

I deliver financial planning solutions that address common financial challenges such as student loan planning, retirement planning, college funding planning, business succession planning, and employment transition.



# CONTACT US



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