salt FINANCIAL™

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Plymouth: 763-489-7379; Coon Rapids: 763-421-5396

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We Provide Financial Planning

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WHO WE SERVE

Business Owners

Executives & Professionals

Retirees & Pre-Retirees

Farmers

WHAT WE DO

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SIX AREAS OF PLANNING

Financial Position: The foundation of your plan starts with cash flow management. We discuss incomes vs. expenses and how it relates to your financial goals.

Risk Management: A complete financial plan helps address the risks that could undermine your goals, deplete your assets, or threaten your income.

Wealth Accumulation: Building wealth starts with your risk tolerance, time horizon, and investment goals. We then find suitable investments to meet those objectives.

Tax Planning: Taxes are addressed in each specific area of your plan. We help our clients review taxes based on current laws.

Retirement Planning:

– Accumulation Phase: We help assess how much needs to be saved to retire at your desired age.

– Distribution Phase: A Retirement Income Plan focuses on which income sources to draw from and at what time.

Estate Planning: Create the legacy you desire while having the proper documents in place.

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PLAN STEPS

Introduction

When we first meet, we both want to answer two questions. Do we have a need to work together? Do we want to work together?

If the answer is Yes then we provide you a cash flow statement and net worth statement along with a document checklist to complete for our next meeting.

Information Gathering

We will complete a detailed questionnaire reviewing this information then discuss your Vision, Values, and Goals.

Modeling Session

The data gathered from the second meeting is inputted into our software and we model your plan live. This meeting helps you understand where you are currently, where you are on-track, and areas where you can improve.

We then build your ideal plan by continuing the things you are doing well, address any gaps, then include strategies to work towards your goals.

Implementation

You will receive recommendations in each of the six areas of planning. This will help you move from your current plan to your ideal plan.

Monitor & Review

Salt Financial encourages regular, meaningful discussions with our clients throughout the year. We'll update your progress while keeping you informed on market changes and circumstances that may affect your plan.

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First Name *

Last Name *

Email *

Phone Number

Message *

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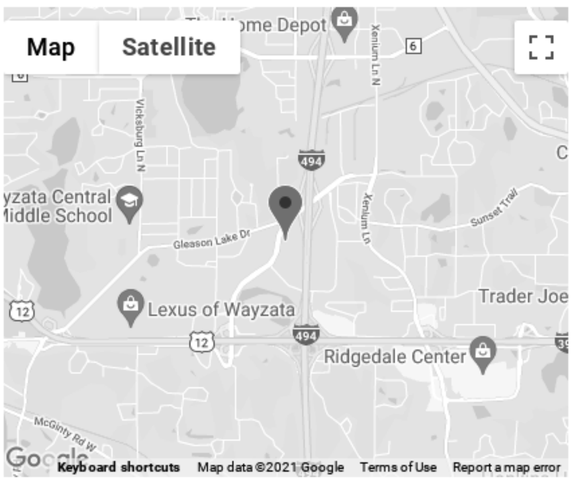

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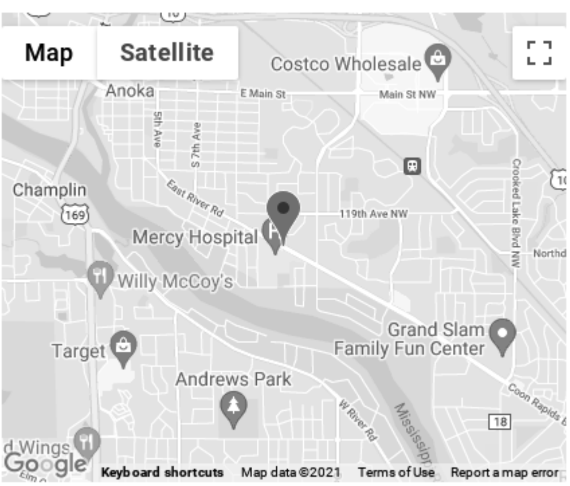

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