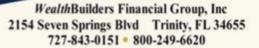


WealthBuilders Financial Group Inc. Professional Tax, Retirement

Professional Tax, Retirement & Estate Planning James M. Noto, CFP®





Your	Ours	
	111	Investment "Watch Dog" Service
_	8	Reviewing your investments and designing a personalized portfolio appropriate to your needs
	E2	Continual monitoring of your investments
	100	Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your
	1	portfolio
ä	621	Quarterly Statements Independent Advice
ŏ	2	Aggregation of all your accounts to simplify and reduce paperwork
:		ABBICE BATON OF BIT YOUR BECOMES TO SIMPLIFY BITO TENDED PAPEL WORK
		Tax Reduction Planning
	2	Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies
	52	Quarterly review of your tax situation and planning to incorporate any new tax law changes
		Complimentary consultation with your tax preparer
_	1	Recommendations of tax solutions including tax advantaged investments
	E2	Staying up-to-date on and presenting new tax laws that can affect your situation
		Retirement Income & Distribution Planning
	37	Analysis of your income needs now and in the future
	62	Analysis of potential estate tax liabilities
	12	Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of
-	_	living
-	60	Recommendations regarding the most appropriate distribution strategy for your employer retirement plans & IRAs
	EZ	Analysis of the beneficiaries of your IRAs
	BCI	Review the possibilities of converting to a Roth IRA
		Family Wealth Planning
	60	Analysis of your current estate plan and concerns
	627	Complimentary consultation with your attorney
	W	Assistance in transferring assets to your Living Trust or other trusts
		Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
	E2	Review of beneficiary designations and asset titling
		Review of your long-term care needs.
		Client Services & Communications
	2	Quarterly Newsletter to keep you apprised of the most current planning options
	₽	Quarterly, semi-annual or annual reviews
	100	Special reports on how to help reduce your taxes and other important topics
	52	Special Gold Medal Service Events (including client education and appreciation events) Where you may bring 2 Guests.

Call or Email Sarah TODAY for a No Obligation Complimentary Consultation!!!!!
- 727.843.0151 staylor@ifgrr.com -