



# WealthBuilders

Financial Group Inc.

Professional Tax, Retirement  
& Estate Planning

James M. Noto, CFP®



WealthBuilders Financial Group, Inc  
2154 Seven Springs Blvd Trinity, FL 34655  
727-843-0151 • 800-249-6620

## Compare our list of **Gold Medal Services** to the services you receive today.

Your Firm	Ours	
		<b>Investment "Watch Dog" Service</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Reviewing your investments and designing a personalized portfolio appropriate to your needs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Continual monitoring of your investments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Frequent meetings to: review, evaluate your investment performance, update your financial objectives and if necessary, reallocate your portfolio
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly Statements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Independent Advice
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Aggregation of all your accounts to simplify and reduce paperwork
		<b>Tax Reduction Planning</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Comprehensive review of your tax return to highlight opportunities to help maximize tax reduction strategies
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly review of your tax situation and planning to incorporate any new tax law changes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Complimentary consultation with your tax preparer
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations of tax solutions including tax advantaged investments
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Staying up-to-date on and presenting new tax laws that can affect your situation
		<b>Retirement Income &amp; Distribution Planning</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of your income needs now and in the future
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of potential estate tax liabilities
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Continual development and implementation of recommendations to fund your income needs and help maintain a comfortable standard of living
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Recommendations regarding the most appropriate distribution strategy for your employer retirement plans & IRAs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of the beneficiaries of your IRAs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review the possibilities of converting to a Roth IRA
		<b>Family Wealth Planning</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Analysis of your current estate plan and concerns
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Complimentary consultation with your attorney
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Assistance in transferring assets to your Living Trust or other trusts
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of beneficiary designations and asset titling
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Review of your long-term care needs.
		<b>Client Services &amp; Communications</b>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly Newsletter to keep you apprised of the most current planning options
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Quarterly, semi-annual or annual reviews
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Special reports on how to help reduce your taxes and other important topics
<input type="checkbox"/>	<input checked="" type="checkbox"/>	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@ifgr.com](mailto:staylor@ifgr.com) -

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