

# Family and Individuals

## Time Tested Wealth Building Strategies for Families, Couples, and Individuals

Custom Strategies are at the CORE of Our Mutual Success

At CORE Financial, we understand that no two people, couples or families are the same- and neither are their finances. Whether you are single, married, or have a family, we can develop a comprehensive financial plan that can help you build and enjoy your wealth throughout your lifetime with confidence.

## Our Process Starts with Listening

CORE Wealth Strategists work with our clients by actively listening and asking questions as to their financial goals. Whether you need assistance planning for retirement, developing an estate plan, or making choices in preparing to finance your children's education, we can develop a customized strategy for any phase of life.

Our team will begin by analyzing the assets you already have and will ask questions such as:

- What are your risk tolerance levels?
- Do you have weak spots related to life insurance, long-term care planning, or casualty insurance?
- Is your portfolio designed to meet your retirement goals?

This analysis enables us to get a better idea of your situation and how we can plan for you. Once you have told us about your financial situation, we will begin to develop a financial portfolio that is fully customized to your financial situation and goals.

# Family and Individuals

## A Secure Financial Future Starts with Making the First Step Today

No matter what stage of life you are in, our team of professionals can help you better prepare you to achieve your financial goals. From helping you restructure your portfolio to taking the first steps toward developing a financial plan, we can help. Give our team a call at (888) 600-1112 to schedule a free strategy session and get started.