

Do you have a financial plan? Have a CFP® help you get a plan!

It's always better to have a plan...and a comprehensive financial plan is one of the most important plans for you family.

What does a financial plan provide?

- Establishes your goals
- Inventories your financial assets and obligations
- Determines what it takes to achieve your goals
- Tells you whether you are on the right path, or what should change
- Provides a way to look at life events to help support the best decision.

The value of working with a CFP®:

- A Certified Financial Planner™ professional is bound to act as a fiduciary, meaning always guiding decisions in the client's best interest
- The CFP® certification is recognized for its:
 1. High standard of professional education,
 2. Stringent code of conduct and standards of practice, and
 3. Ethical requirements that govern professional engagements with clients.

If you don't have a plan, or need to update one, have **KMR Financial Advisory** help you create a plan for your family. You will be able to:

- Work directly with a CFP® professional
- Have consultations to gather information plus review the recommendations in the plan
- Receive an extensive plan report that displays in detail the financial inventory, goals, risk tolerances, and recommendations
- Provide opportunities for on-going plan monitoring, financial consultations, and asset management.

Having a financial plan will provide the peace of mind that comes with the knowledge that you and your family are on a path to successfully achieve your financial goals.



www.kmrfinancial.com
@kmrfinancial
questions@kmrfinancial.com
404-876-2558