

Comprehensive Financial Planning

by KMR Financial Advisory, Inc.



A financial plan lets you see the big picture...

...and helps you make good financial decisions.



Everyone Deserves a Quality Financial Plan





Comprehensive Financial Plan Development

by KMR Financial Advisory



KMR Financial Advisory, an independent, fee-only Registered Investment Advisor, can develop comprehensive financial plans for individuals or families, accurately and efficiently



Frank R. Brannon, CFP ®, is the president of KMR Financial Advisory, Inc. Frank's educational background includes:

- The Lovett School
- BA, Economics, Tulane University
- Master of Decision Sciences, Georgia State University

Frank is a Certified Financial Planner™ professional and achieved his license in 1996. Frank has worked most of his career in corporate financial planning for a Fortune 200 company. He has lived his entire life in Atlanta.

Financial plans are developed by Frank Brannon, a CERTIFIED FINANCIAL PLANNER™ with 20 years of experience in personal financial planning



Comprehensive Financial Plan Report



Current Portfolio Allocation

This page shows how your investment Assets are currently allocated among the different Asset Classes. It includes only those Assets you have identified to fund Goals in this Plan.



Total Stock
70%

Projected Returns

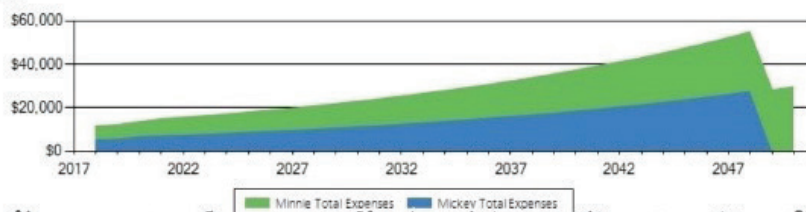
Total Return	6.13%
Base Inflation Rate	2.50%
Real Return	3.63%
Standard Deviation	13.75%

Bear Market Returns

Great Recession November 2007 thru February 2009	-32%
Bond Bear Market July 1979 thru February 1980	8%

Worksheet Detail - Health Care Expense Schedule

Scenario : Sell Lakehouse



KMR utilizes industry-leading technology from MoneyGuidePro® to develop financial plans that include a wide variety of financial planning situations, including:

- Personal & Family Goal setting
- Retirement timing decisions
- Social Security timing decisions
- Education funding
- Estate Planning
- Life Insurance needs analysis
- Long-Term Care needs analysis

Standard Plan \$750

Includes:

1. Initial consultation & final review consultation
2. One-page summary
3. MoneyGuidePro® report
4. Spreadsheet with detail on cash flows and account balances
5. Summary of To-Do's and timeline

Premier Plan \$1,500

Includes Standard Plan plus:

1. Estate planning analysis
2. Insurance needs analysis (life, long-term care)
3. Social Security strategies
4. 6 month follow-up review of plan status
5. 1 year follow-up with plan update

Other Planning Services \$150/hour

Custom Analyses such as:

1. Retirement timing decisions
2. Home purchases & sales
3. Income tax planning
4. Household budgeting
5. Pension buyout decisions

Everyone deserves a quality financial plan! If you would like to find out more, please contact us!



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