

EDDIE DOYLE

Financial Advisor

OVERVIEW OF GOAL-BASED FINANCIAL PLANNING

ESTATE PLANNING QUESTIONS

- What happens when the first spouse passes?
- What happens when the surviving spouse passes?
- What happens when a person is incapacitated?

TAX PLANNING QUESTIONS

- What are you doing to mitigate tax exposure while both spouses are alive?
- What is your tax plan for a surviving spouse?
- Do you need a tax plan for heirs?

RISK MANAGEMENT QUESTIONS

- What will you do at a premature death?
- What will you do at a disability event?
- How will you fund a long-term care event?

INCOME PLANNING QUESTIONS

- How much of your income do you want to be predictable or assured?
- What is your income when your spouse passes?
- Will your heirs need income when you pass?

INVESTMENT PLANNING QUESTIONS

- Is your investment plan tax efficient?
- Does your plan manage marketability and liquidity risk?
- Is your plan considerate of your legacy goals?



FULL SWING FINANCIAL