

## Planning and Analysis Services:

Our Planning and Analysis Services encompass a variety of issues depending on the needs of the client.

- **Projections** may include:
  - Retirement Cash Flow
  - Education Funding
  - Survivor Needs Cash Flow
  - Long Term Care Cash Flow
  - Estate Tax Estimate
- **Review and Analysis:**
  - Existing Investments
    - Investment allocation / diversification
    - Risk vs. return
    - Moral screening
  - Employer-Provided
    - Retirement Benefits
    - Insurance Benefits
  - Estate Planning Documents
  - Current Use of Debt and Alternatives
  - Existing Insurance
- Review of **Charitable Giving Alternatives:**
- **Business Issues:**
  - Picking The Right Retirement Plan
  - Business Continuation
  - Non-Qualified Deferred Compensation

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### Dan Hardt Financial Services

*"Where Your Life and Your Money Work Together"*

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