BOX FINANCIAL ADVISORS

Principled • Stewardship • Preservation

To schedule a no-obligation meeting, call **817-865-1811**

Financial Planning Services

There are many companies that can tell you how to spend and save your money. At **BOX FINANCIAL ADVISORS**, our primary focus is not simply on the dollars and cents, but on your life – your business, family, and future. As a steward of your resources, we guide our clients to view money as a trust, a tool, and a test. Our fixed cost, comprehensive financial planning services have evolved into what we call the ***10 Wealth Stewardship Topics:***

1. **Cash Flow Planning**
   - Implement budget system to track monthly expenses and provide accountability to the plan.
2. **Debt Management**
   - Evaluate options to consolidate debt, reduce payments, or align with your budget.
3. **Contingency Planning**
   - Calibrate all your insurance coverages to determine if you have the appropriate amounts
   - Analyze employer provided benefits compared to private insurance.
4. **Investment Counsel**
   - Present opportunities that align philosophically with each of your goals.
   - Introduce alternative investments with highly collateralized tangible assets.
5. **Generosity & Giving**
   - Develop a proactive strategy for non-profit and community support, along with any corresponding tax benefits.
6. **Retirement Planning**
   - Help to ensure your future is safe and not left to chance.
   - Analyze tax implications by using various retirement vehicles.
7. **Education Planning**
   - Prepare tax-saving options to fund your children's future and not burden your budget.
8. **Estate & Legacy Planning**
   - Help select the best steward(s) for your financial affairs.
   - Execute legal documents to ensure your wishes are fulfilled.
9. **Business Continuation & Succession**
   - Develop a plan for your exit strategy to maximize the value of your life's work.
10. **Special Situations**
    - Advise on other issues that impact your finances, such as caring for a special needs child or elderly parents.

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