Don Scholl and Associates

GOLD MEDAL SERVICES

We Develop a Blueprint to Coordinate All Your Financial Planning Needs:

• Income • Healthcare • Tax Planning • Estate Planning
• Family and Lifestyle Needs

Investment Risk Control

- Continuous monitoring and adjusting of portfolio to help limit risk and maximize gain
- Strategies to help make a smoother investment ride by limiting the shocks of market volatility
- Help you develop the confidence that you can stick with your investment plan and not panic
- Independent counseling from a Certified Financial Planner and Registered Investment Advisor
- Quarterly Reviews and Meetings to evaluate your investment performance
- No Sales Charges and Commission-Free transactions

Tax Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for tax reduction
- Quarterly review of your tax situation to incorporate any new tax law changes
- Complimentary consultations and coordination of planning with your tax preparer
- Recommendation of tax reduction solutions including tax advantaged investments and plans

Personal Financial Advocate

- Timely response to your calls and communiqués
- Interface directly to make sure your needs are addressed by companies, plan custodians, and government bureaucracies (ie. like CalPERS and CalSTRS)
- Assist you in qualifying for loans and mortgages
- We take a personal interest in you and your needs and are zealous in providing for your needs
- Informative Quarterly Newsletters and Special Reports as investment and tax landscape change
- Assistance in formulating goals and the courses of action necessary to satisfy those goals

Retirement Income and Distribution Planning

- Assess your income needs now and in the future and arrange for appropriate distributions
- Establish investment portfolios designed to generate income necessary for your plans and needs
- Arrange for Required Minimum Distributions from Retirement Plans and calculate the RMD
- Update Beneficiaries of Retirement Plans and establish Inherited IRAs for beneficiaries
- Sophisticated Computer generated projections of future Cash Flow and Needs

Family Wealth Planning

- Analysis of your current estate plans and concerns
- Complimentary consultation with your attorney; Trust attorney recommendations provided
- Assistance in transferring assets to your Trust and in transferring assets to your beneficiaries
- Provide guidance in the necessary steps in the event of the death of a loved one
- Coordinate investment strategies so they are consistent with Estate and Tax planning

Health and Long Term Care Planning

- Assess your Health Care and Long Term Care needs based on family and financial circumstances
- Analyze your asset needs and estate protection needs should you become dependent
- Suggest a wide range of solutions and options for dealing with Long Term Care Needs
- Provide counsel on Medicare and Social Security planning

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