

# FINANCIAL AURORA

Financial Aurora, LLC.  
3200 Steck Avenue | Suite 250 | Austin, TX 78757  
Office: 512.213.6400  
Toll Free: 866.238.4230  
Fax: 512.213.6401  
Email: [services15@financialaurora.com](mailto:services15@financialaurora.com)  
[financialaurora.com](http://financialaurora.com)

Independent Fiduciary

No Commission Revenue in Advisory Accounts

Proactive Contact

Comprehensive Financial Products & Services

## MENU OF SERVICES

### Financial Planning

2-4 Meetings per year

Fee: Fixed Fee

Receive written recommendations for specific financial goals.

Services:

- Retirement Planning
- Retirement Income/Distribution Planning
- Education Planning
- Budgeting & Cash Flow Planning
- Home Purchase Planning
- Mortgage/Debt Management Planning
- Cash Reserves Planning
- Insurance Planning
- Estate/Will Planning
- Divorce Planning
- LGBT Needs Planning
- Charitable Giving Planning
- Corporate and Personal Tax Planning
- Inheritance Planning
- 401(k) Creation
- Business and Personal Financial Planning
- Planning for anything else that affects your money

### Asset Management

1-2 Meetings per year

Fee: Investment Advisory Fee

Investment recommendations for assets based on your time frame and risk tolerance.

Receive investment advice specific to assets held within accounts.

Services:

- IRAs, including Traditional IRAs, Roth IRAs, and Inherited IRAs
- 401(k)s
- Non-Qualified accounts and regular (taxable) Brokerage accounts
- 529 & Coverdell Education Savings accounts
- Access to mutual funds, exchange traded funds (ETFs), individual stocks and bonds, options and other investment types
- Access to annuities, fixed and variable, with and without guaranteed income/withdrawal benefits

### Insurance

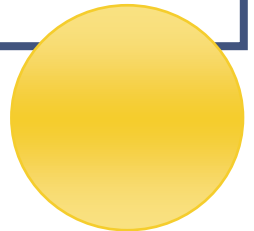
1-2 Meetings per year

Fee: Commission

Insurance recommendations based on protection needs.

Services:

- Life Insurance
- Disability Insurance (Income Protection Plans)
- Long-Term Care Insurance



FOR QUESTIONS TO ASK A FINANCIAL ADVISOR & WHY YOU SHOULD USE  
FINANCIAL AURORA, VISIT [FINANCIALAURORA.COM/ABOUT-US](https://financialaurora.com/about-us)

**Where does the name Financial Aurora come from?**

**aurora**

noun.

1. dawn
2. from the Latin word aurora, meaning “sunrise,” or the Roman goddess of dawn
3. a luminous phenomenon that consists of streamers or arches of light appearing in the upper atmosphere of a planet’s magnetic polar regions.