



# FINANCIAL AURORA

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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 advice & 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
- Marriage/Divorce Planning
- Pension Planning
- Charitable Giving Planning
- Corporate and Personal Tax Planning
- Inheritance Planning
- 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 management, advice, and service for assets held in accounts we manage.

Services:

- Traditional IRAs
- Roth IRAs
- Rollover Advice
- Beneficiary (Inherited) IRAs
- Non-Qualified accounts (regular taxable investment accounts)
- Trust investment accounts
- 529 & Coverdell Education Savings accounts
- Mutual funds, exchange traded funds (ETFs), individual stocks and bonds, options, and other investment types
- Annuities, fixed and variable, with and without guaranteed income/withdrawal benefits
- Business 401(k) Creation & Service

### Insurance

1-2 Meetings per year

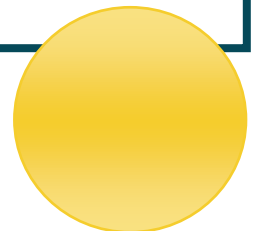
Fee: Commission

Insurance recommendations based on protection needs.

Services:

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

Financial Aurora offers financial advisory services, investment management, insurance, and annuity products. Financial Aurora does not prepare taxes or create legal estate documents. Please consult your tax advisor and/or attorney regarding your specific circumstances.



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.