NARROW GATE
Wealth Management

ORGANIZING AND UPDATING YOUR WEALTH PLAN

A comprehensive wealth plan takes into account every aspect of your financial life. Before meeting with us, here are some questions to consider to help ensure your wealth plan meets your needs and goals.

TAX PLANNING

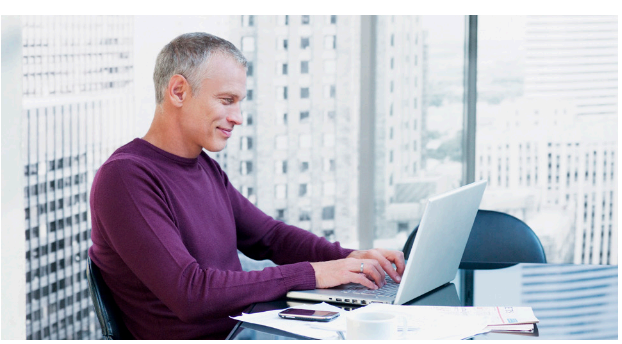
- Are you optimizing pre-tax 401(k) and IRA contributions?
- Are you taking advantage of tax-reduction strategies?
- Have you thought about tax-efficient gifts, trusts and foundations?
- Have you considered year-round tax planning?

Consider obtaining a second opinion on your estate plan and tax return to see if there are ways to reduce your tax burden.

SMART ASSET PROTECTION

- Do you have a plan in place to protect your assets should you need to?
- Are your digital assets titled and secured?
- Is your business interest protected as you intended?

Meet with us to help ensure your wealth plan is designed to mitigate risk and shield your assets against potential litigation.



DIVERSIFIED INVESTMENTS

- Have you considered your risk tolerance and time frame for reaching your goals?
- Is your portfolio diversified among asset classes such as equities and fixed income?
- Have you reviewed your portfolio recently to ensure it is still aligned with your goals?

We can consult with our investment team to help ensure your portfolio is appropriately diversified.

RISK MANAGEMENT AND HEALTH CARE

- How will the insurance market ripple effects impact your health care coverage and rates?
- What will the impact be on your business and benefits?
- How do interest rates impact your life insurance policies?
- Are you properly insuring your ability to replace income?

We can consult with our insurance team to review your existing insurance policies and recommend new ones as needed to help ensure you have the appropriate coverage to protect your assets and loved ones.

ORGANIZING YOUR DOCUMENTS AND COORDINATING YOUR PLAN

- Do you have one secure location for all of your important documents (passport, estate, legal, tax, etc)?
- Are your advisors (tax, legal, investment, wealth, etc) communicating fully and efficiently?
- Are you able to see your entire financial picture at any time?

It can help save time, money, and hassle by having everything secured in one space, while also helping to ensure that all components of your plan are coordinated.