



# FINANCIAL WELLNESS PROGRAM

## ASSET MANAGEMENT

MUTUAL FUND PORTFOLIO OPTIONS

FIXED ANNUITIES vs. VARIABLE ANNUITIES

INVESTMENT ALLOCATION STRATEGIES

TRADITIONAL IRA'S vs. ROTH IRA'S

401K / 403B ROLLOVERS

EARLY RETIREMENT PLAN DISTRIBUTIONS

LIFETIME RETIREMENT INCOME PRESERVATION

## ASSET PROTECTION

LIFE INSURANCE

HEALTH INSURANCE

SUPPLEMENTAL HEALTH INSURANCE

HEALTH SAVINGS ACCOUNTS

PRE-MEDICARE COVERAGE

MEDICARE SUPPLEMENTS

LONG TERM CARE PLANNING

OHIO PARTNERSHIP LTC INSURANCE

DISABILITY INSURANCE

## LEGACY PLANNING

GIFTING STRATEGIES

WILLS AND TRUSTS

GENERATIONAL TRANSFERS

ANNUITIES

LIFE INSURANCE

ESTATE TAX PLANNING

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