

Each plan encompasses
THE 5 KEYS TO A STRESS

FREE RETIREMENT:

1. Estate & Legacy Planning
2. Investment Planning
3. Income Planning
4. Tax Strategy
5. Healthcare Planning

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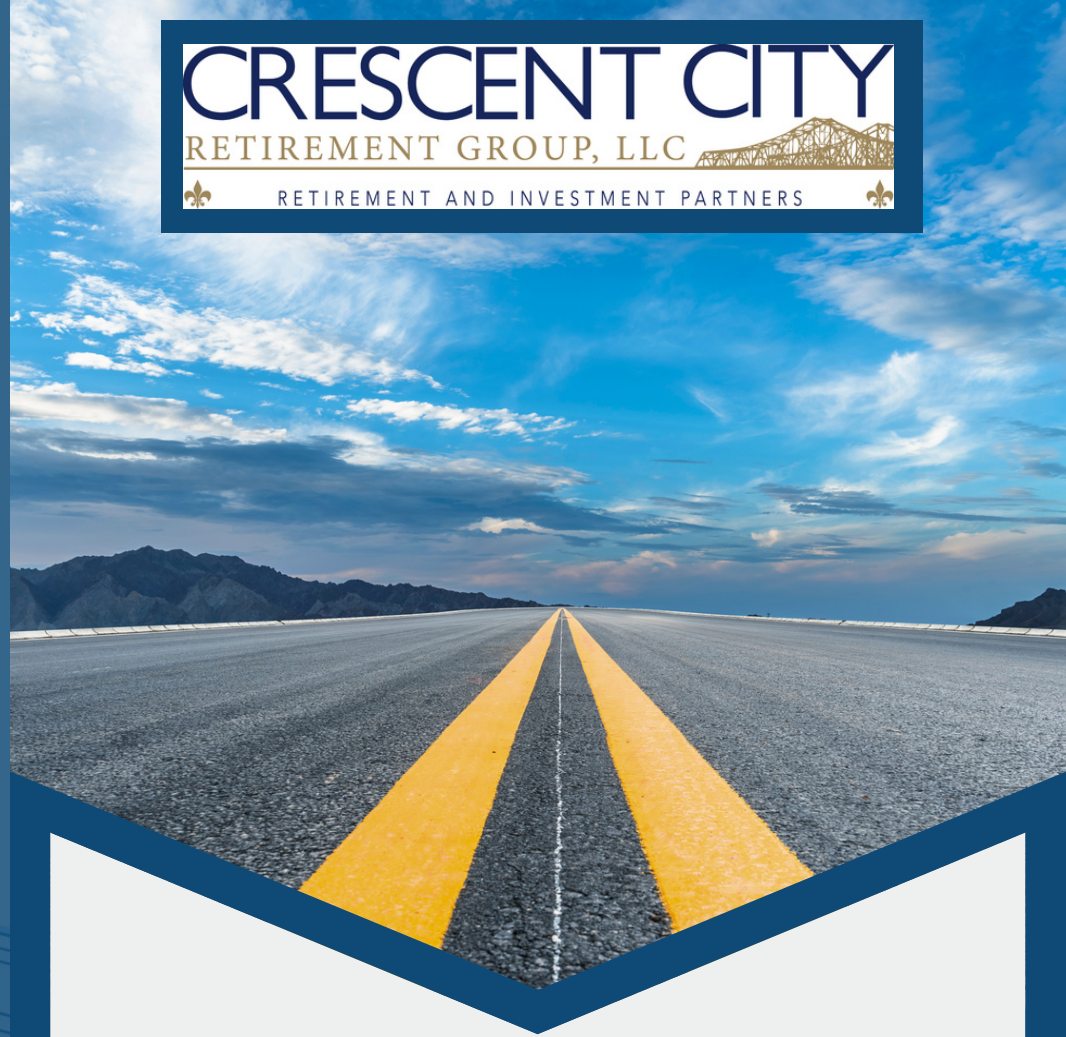


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CRESCENT CITY
RETIREMENT GROUP, LLC
RETIREMENT AND INVESTMENT PARTNERS



RETIREMENT

ROADMAP

YOUR KEYS TO A STRESS FREE RETIREMENT!

GOLD PLAN

Investment Planning:

- Financial Overview
- Color of Money Report
- Nitrogen Risk Score & Portfolio X-ray

Income Planning:

- Social Security Maximization Report
- Private Pension Max Report
- Retirement Compass

Tax Planning:

- Roth Conversion Report
- Holistaplan Report
- Found Money Report
- Complete **Action Plan**

\$699.99

PLATINUM PLAN

All the above reports included along with the below:

Healthcare Planning:

- The strategic organization and management of resources to ensure effective and efficient healthcare services that suits your lifestyle.

Estate & Legacy Planning:

- IRA Legacy Report
- Estate Planning Checklist

\$899.99

WHAT IS EACH REPORT?

Financial Overview: The foundation of your plan! This report organizes your assets by titling and tax type.

Color Of Money: An organization of your assets by color and risk profile to ensure your assets are being utilized appropriately.

Portfolio X-Ray Review: This overview process provides you with a detailed portfolio analysis, helping you understand your risk and reward ratio.

Social Security Maximization: The foundational income planning report that maximizes your social security strategy for an enhanced income plan.

Retirement Compass: This report pulls everything together, running all distribution assets in the most tax efficient way.

Roth Conversion: An analyzation of your retirement dollars into an income tax-free environment.

Holistaplan Report: This award-winning tax planning software is built to systematize and automate the process of reviewing your tax return to uncover potential planning opportunities.

Found Money Report: Key tax strategies to help create efficiencies within your plan.

Action Plan: A step-by-step instruction on the execution and maintenance of your retirement plan.

IRA Legacy: Covering the Secure Act impact on inheritances and highlights life insurance for wealth transfer.