



Personal Financial Planning

Your existing relationship with Kennedy and Coe is the ideal foundation for a deep understanding of your financial affairs and aspirations. So who better to help you evaluate and improve your investment, retirement, insurance and estate plans than the professionals of the Personal Financial Planning Division of Kennedy and Coe?

Our investment and insurance professionals are experienced advisors who offer innovative solutions to both businesses and individuals. Our focus is developing strong customer relationships for the long road ahead. Skills in a variety of fields allow us to address virtually any financial need, with the maturity, detailed knowledge, professional objectivity and comprehensive resources that you need to make the most of life's milestones as you meet them. Our planners will use these tools, along with our detailed knowledge of your situation, to identify your current needs and develop strategies to help you meet your goals.

The professionals at Kennedy and Coe can:

- Provide an unbiased, realistic view of your present and future financial situation
- Develop a detailed inventory of your assets, liabilities, insurance and estate documents
- Evaluate your estate structure and related costs
- Evaluate the cost effectiveness of your current insurance
- Evaluate your portfolio and offer advice and recommendations
- Project and illustrate annual cash flow and annual capital growth
- Summarize all data and prepare a personal financial scorecard listing areas of need and concern based on your goals and objectives for the future

Our commitment remains to work closely with you in developing a clear picture of your financial situation and be an advocate to help you reach your financial goals. We do not sell financial products, and we will not squander your time focusing on areas where there are no financial concerns.

Life is often laden with curves that we can't anticipate, but the professionals at Kennedy and Coe can help create a roadmap for financial success that will make you feel secure about your future.

Call 800-303-3241 for more information.