Financial Planning Services

Roche
Financial Partners

Plan

It is often difficult for individuals to evaluate their overall financial position. When we design a comprehensive wealth plan, you will have a clear picture of where you are today and where you are headed tomorrow.

We will provide a personal report containing your current and projected financial position, retirement analysis, insurance analysis, and more. We will help you prepare for foreseen events such as retirement and educational expenses and unforeseen events such as disability or a death in the family. Our team will be available to help you analyze financial decisions and maximize financial opportunities as they arise.

Comprehensive Wealth Planning

Investment Planning

- Retirement
- Education
- Goals

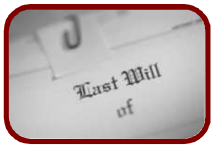
Cash Management

- Debt Reduction
- Interest Analysis
- Expense Review

Risk Management

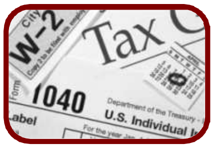
- Life Insurance
- Disability Insurance
- Long Term Care

Estate Planning



- Wills
- Trusts
- Medical Directives

Tax Planning



- Tax Loss Harvesting
- Capital Gain Review
- Yearly Tax Planning

Designing Your Wealth Plan

Designing a plan involves several steps. Each one is important, and all must be coordinated if your financial plan is to succeed. The five main steps in the process are:

I. Meeting to get acquainted

II. Data gathering and organization

III. Interactive goal setting

IV. Analyze your information and design your plan

V. Present your customized plan with action items

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"Having the right plan is the first step in achieving your financial goals."

Robert Gregov, CFA, CFP®
President/Founder

Contact Us:

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Email: Info@rochepartners.com
Website: www.rochepartners.com

Roche Financial Partners

Your Personal Wealth Management website is available 24/7 so you can view all the information you need when you need it.

Implement

Roche Financial Partners understands that the most challenging part of any wealth plan is implementation. That is why we will be there every step of the way. Whether it's negotiating insurance terms, speaking to estate attorneys or choosing appropriate investments -- Roche ensures that each recommendation is implemented efficiently and effectively. Each client receives a clear and comprehensive roadmap of the action items needed to achieve their financial goals.

Monitor

Roche Financial Partners will monitor your plan, portfolio and progress on a daily basis. We utilize a sophisticated alert system to notify us when a change is needed to your plan or portfolio. We also use a state-of-the-art investment platform to ensure your portfolio adheres to your risk and return parameters and our investment principles. Finally, each of our clients is provided a Personal Wealth Management website where they can view their entire financial picture in one place. Having a clear and comprehensive wealth plan monitored by a trusted advisor is the most effective way to make your goals a reality.

Your Personal Wealth Management Website provides you with:

- Daily balances on all your financial accounts
- Daily wealth planning reports and action items
- A safe and secure online document "Vault" for all your important documents
- A sophisticated monitoring system to ensure timely action when needed
- Wealth planning progress and tracking system