

**Financial Workshops**

*Edmond Consulting Group LLC*

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Who are ECG?

Edmond Consulting Group LLC (ECG) offers professional and reliable services in the financial sector, tailored to suit your individual situation is a given. We offer in-depth consultations to understand your financial goals and current situation and craft a long-term solution that is right for you.

ECG utilizes a team approach when addressing her clients' interests. Strategic relationships with attorney's, CPA's and other financial professionals assist them in providing the following services:

* Business Planning
* Wealth Accumulation
* Protection (ALL Insurance Products)
* Estate Planning
* Financial Independence
* Tax Planning
* Notary Services



Our Dedication:  
ECG takes pride in the specialized services and advanced financial strategies he is able to provide to his clients.

ECG regularly conducts Financial Management Workshops in the community, and seminars for business owners to teach them how to protect their business, enhance their personal wealth and eventually reap the rewards of their labor through business exit and succession planning.

Faith Based Organizations or nonprofit will benefits with monthly donations if they participate with commitment to monthly FREE workshops to improve the finance, health and wellness within the community by educating while maintaining life changes.

Benefits For You                                                                                   

I encourage questions and establish an atmosphere where learning is a priority. You will feel at ease asking questions, allowing a two-way street when creating your financial plan.

**Family Financial Plan**

*Saving for Retirement*

* How do your feelings about money affect your spending habits?
* Do fees and investment options impact your 401k rate of return?
* What should you do with your 401k when you leave your company?

*Saving for College Funding*

* How much to save?
* How does financial aid affect your savings rate?
* Does school choice play a role in financial aid?

**Retirement Transition**

*Pre-Retirement (5-10 years prior to retirement)*

* What do you want your retirement to look like?
* How do you evaluate retirement expenses?
* How will you know if you have saved enough?

*Retirement (1-5 before years or in retirement)*

* How will you know when to take distributions?
* What is your IRA required minimum distribution?
* Will you owe income taxes on Social Security benefits?

**Sudden Financial Changes**

*Inheritance*

* What new opportunities are now available to you?
* What effect on your identity, career, relationships, and lifestyle will your new money have?
* What are your feelings about money and how it affects your spending habits?

*Divorce*

* How will you manage your finances?
* What about your retirement needs?
* Sell your home now or later?

*Widow/Widower*

* What do you need to know about money?
* When and how to sell your home?

      Will you have enough to last for the rest of your life?

For the Seniors Ministry or Organization

Achieving retirement is within reach. With Edmond Consulting Group, we make it possible. Protecting the health and retirement needs of Middle America is at the core of what we do.

While we are not an insurance company, insurance is our business—developing, marketing and distributing annuity, life and health insurance solutions.

**Preparing for Retirement Seminar**

Are you financially ready for retirement? Maybe you’re not quite sure, or just don’t know where to begin? Attend our latest seminar and learn about:

* **Retirement Accounts and IRAs**  
  Managing your investments and generating the income you need during retirement
* **Social Security**  
  Maximizing benefits for yourself, your spouse and your children
* **Estate Planning**  
  Ensuring your assets are protected and distributed as you want, with no surprises

**Understanding How Social Security Works … To Make It Work For You**

Learn when you should file, how you can maximize your benefit and much more.

**The Truth About Retirement Plans and IRAs Webinar**

Do you know the 4 investments you should never choose for your retirement plan? How should you invest the contributions you make with your current paycheck? And what should you do with old, dormant retirement accounts? Learn the answers to these and many more retirement planning questions.

**Our Initial Consultation**

Your Financial Snapshot services will involve consultation, analysis, and recommendations in the 6areas of financial planning:

(1) Cash Flow

(2) Tax Planning

(3) Insurance Review

(4) Investment Review

(5) Retirement Planning

(6) Estate Planning

Your present financial situation will be reviewed and a written analysis and report of recommendations will be given to you based on your goals and objectives. This service may include an initial consultation and follow-up visits. The services provided may include but would not be limited to the following:

• Create a cash flow statement;

• Review your current investment and make recommendations thereon;

• Review your most recent tax returns and provide tax planning advice;

• Review your life insurance and disability insurance and make recommendations thereto;

• Review your estate plan and make recommendations thereto;

• Complete a retirement analysis; and

• Provide education planning advice.

Your Financial Snapshot services provided by Edmond Consulting Group LLC. Edmond Consulting Group LLC' Financial Snapshot fees shall be builted upon the financial product that the consumer purchase or other services that we provides. Edmond Consulting Group LLC will create a written financial plan for delivery to you. Edmond Consulting Group LLC, unless engaged separately to do so, will not be responsible for the implementation of the plan. Client assumes full responsibility for the implementation of the plan.

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