SECURITIES & INVESTMENT ADVISORS, INC.

Menu of Services

"Navigators of your Financial Future"

Retirement Planning

- Retirement Accumulation Planning and preparing for Full, Early & Partial Retirement
- Retirement proposals, Strategies, Life Plans and Roadmaps to achieve life goals
- Medicare Planning – Analysis & Supplement/Advantage Plans
- Annual Review of Personal Financial Policy Statement
- Income vs. Expense Analysis, Strategies & Plans
- Annual Financial Plan Review
- Social Security Planning
- Retirement Counseling

Investment Planning

- Managed Accounts, Annuities, Mutual Funds, Exchange Traded Funds, Stocks/Bonds
- Assessment of Current Plan and Asset Allocation
- Risk Tolerance & Analysis of Investment Plans
- Assessment of Investments held outside SIA
- Managing taxes inside your Portfolio

Estate Planning

- Assessing the Titling of Assets & making sure registered properly
- Legal Document planning and preparing with Attorney's
- Advanced Medicaid Planning and Preparation
- Planning for Protection of your Assets
- Trust planning and retitling of Assets
- Next Generation Planning

Loss of a Loved One

- Processing of Life Insurance, Retirement & Pension claims
- Review and Completion of all necessary paperwork
- Communication of Actions with Attorney
- Mourning/Grieving Services
- Family Planning Meetings
- Re-registration of Assets

Other Services Provided

- Family Support Planning – Planning for Aging Parents & Special Needs
- Insurance – Life Insurance, Long-Term Care and Business Insurance
- Business Retirement Plans – 401(k), Simple IRA & SEP IRAs
- Tax Planning – Lowering, Deferring or Eliminating Taxes
- Tax Preparation Services and Tax Analysis
- Next Generation Education Services
- 529 College Planning
- Charitable Gifting