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# How Can Soundview Help?

## Investment Planning

- [ ] Asset Allocation / Diversification
- [ ] Time Horizon
- [ ] Risk Tolerance
- [ ] Withdrawals and Contributions
- [ ] Environmental, Social and Governance (ESG) Investments
- [ ] Outside Investments

## Retirement Planning

- [ ] Short-Term / Long-Term Goals
- [ ] Retirement Cash Flow
- [ ] IRA Contributions
- [ ] Roth Conversions
- [ ] IRA Required Minimum Distribution Strategy
- [ ] Retirement Plan Rollovers
- [ ] Social Security Analysis
- [ ] Employer Sponsored Plans
- [ ] Self-Employed Plans

## Risk Management and Insurance

- [ ] Self-Insuring Options
- [ ] Existing Policy Review
- [ ] Life Insurance
- [ ] Umbrella Policies
- [ ] Health and Disability Insurance
- [ ] Long-Term Care Insurance

## Cash Flow and Budget

- [ ] Cash Flow Modeling
- [ ] Large Expenditures
- [ ] Debt Management and Repayment
- [ ] Emergency Fund
- [ ] Monitor and Update

## Estate Planning

- [ ] Will / Trust Review
- [ ] Account Titling
- [ ] Beneficiary Designations
- [ ] Charitable Giving
- [ ] Distribution Planning
- [ ] Power of Attorney Review
- [ ] Health Care Directive Review

## Planning for Loved Ones

- [ ] Gifting
- [ ] Education
- [ ] Elder Care
- [ ] Special Needs Trust

## Tax Aware Investing

- [ ] Tax Loss Harvesting
- [ ] Capital Gains and Investment Income
- [ ] Step-Up of Cost Basis

## Compensation Analysis

- [ ] Deferred Compensation
- [ ] Restricted Stock Units (RSUs)
- [ ] Stock Options
- [ ] Business Exit Strategy

## Coordination and Collaboration

- [ ] D.A. Davidson Research
- [ ] D.A. Davidson Trust
- [ ] D.A. Davidson Wealth Planning
- [ ] D.A. Davidson Insurance and Annuities
- [ ] Certified Public Accountants (CPAs)
- [ ] Attorneys
- [ ] Health Care Resources

SOUNDVIEW WEALTH MANAGEMENT
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