



N

O

S

D

A

V

I

D

A

D

## 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

members of D.A. Davidson & Co. member SIPC



D | A | DAVIDSON

*D.A. Davidson & Co. financial advisors are available to discuss the ideas, strategies, products and services described herein, as well as the associated suitability and risks. Through your financial advisor, you have access to additional resources at D.A. Davidson including comprehensive financial tools and a full team of professionals specializing in insurance, trust services, and estate, retirement and financial planning. D.A. Davidson does not provide tax or legal advice. Questions about the legal or tax implications of any of the products or concepts described can be directed to your accountant and/or attorney.*