



**Lee W. Framer, J.D.**

Investment Advisor Representative



## Financial Planning Service

- Unique personal plan tailored to your individual goals
- Needs analysis for College Funding, Retirement, Disability, Family and Wealth Accumulation
- Estate Strategies for an efficient organized distribution of assets
- Risk Tolerance Review including proper Asset Allocation techniques
- Assist in implementing solutions highlighted in your Financial Plan
- Annual review to help assure goals are being met