

# FINANCIAL SECOND OPINION™

*Your financial health is too important to leave to chance...*

**You have an Accountant, Lawyer,  
Stock Broker & Insurance Agent...**

**But are your financial  
affairs coordinated?**

**IFP**

*Integrated Financial Partners, Inc.*

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Sure, you have an accountant, an attorney and a stockbroker. You also receive advice from well-meaning friends, relatives and business associates. But do you have a translator? Someone who is looking at the pieces of your financial puzzle to see if your goals are being met?

We are Integrated Financial Partners, Inc. Our independent team of financial planners can provide you with a life-impacting second opinion of your financial position. Our unique Financial Second Opinion™ offers you a report that will give you updated and concise information on vital financial matters that affect you and your family. This report will provide a review of your existing:

- Investments
- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance
- Estate Plan, Wills & Trusts
- Income Taxes
- Buy/Sell Analysis
- Survivor Needs
- Retirement Strategies



## *Estate Planning*

Taxes can significantly shrink the size of your estate. After reviewing your asset ownership along with your wills and trusts, we will generate a report highlighting your estate tax exposure.



## *Investment Planning*

We assist you in identifying your investment objectives, evaluating your risk tolerance, and analyzing your current portfolio to develop an appropriate asset allocation strategy.

# IFP

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## *Retirement Planning*

With retirement often lasting for 20 years or more, you may be concerned about outliving your savings. We will help you choose the best techniques to accumulate wealth for your retirement and income.



## *Business Owner Planning*

As a business owner, your business is most likely your single largest asset. The Financial Second Opinion™ report can help you decide whether to keep or sell your interest at death, disability or retirement.

Lincoln Financial Advisors Corp. and its representatives do not give legal or tax advice.

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