

# DCM FINANCIAL PLANNING

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ENJOY THE SUCCESS YOU HAVE BUILT. A customized financial plan seeks to bring you clarity and peace of mind for your situation and road ahead.

# Benefits of a Financial Plan with DCM

A DCM financial plan will help give you the freedom to focus on what matters most. Our CERTIFIED FINANCIAL PLANNER™ professionals offer you a roadmap with strategies that seek to fulfill your goals.

As fiduciaries, we are in your corner, and we always work to put together the best plan without the influence of compensation incentives. For you, that means independent and objective advice that advocates for your best interests.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and Certified Financial Planner™ in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

## Areas of Financial Planning



Cash Flow & Debt Management



Tax Planning



Estate Planning



Retirement Savings & Income Planning



Investment Planning



Education Planning



Risk Management & Insurance Planning



# We Believe Financial Planning:

- Is an ongoing process, evolving as your goals change
- Presents thoughtful solutions
- Anticipates unforeseen challenges

## The Journey





# What to Expect

## A Meeting for Questions, Live Adjustments & Recommendations

- What if I retired earlier?
- What if we bought a second home?
- What if we did a Roth Conversion?

## A Path Forward

A full plan, including likelihood of success, stress test scenarios, and recommended next steps.

## A Partner Now and In the Future

Once your plan is in place, our team will be by your side as you move forward and will be available to answer questions as they arise in the coming years.

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