LEVEL FOUR® Advisory Services
A DIVISION OF CARR, RIGGS & INGRAM CAPITAL, LLC

Financial Planning

> Be in control of your financial future:
>
> We'll show you the possibilities.
> You'll choose the path you want to take.

You do not need to consolidate assets, write new insurance contracts nor buy products to receive fiduciary partnership for any part of your plan. Financial planning is more than investment strategy. We understand life's challenges and value our ability to organize and simplify your wealth, create scenarios for pursuing your goals, plan for unpredictable events, and communicate proactively.

Financial planning is essential to deal with risk, investment strategy and protection for your financial household. In order to ensure your money is where it needs to be, you must know how your entire financial puzzle fits together.

FLEXIBLE FEE STRUCTURE

Our fee only engagements are mutually determined by you and your advisor and is tailored to you. You only pay for the planning services and expertise you request.

WHAT KEEPS YOU UP AT NIGHT?

Concerns about your financial responsibilities and personal life are often intertwined. We are dedicated to supporting you in making solid decisions by providing clarity on complex issues.

PERSONALIZED ROADMAP

We create customized planning road maps to show you what you've accomplished, where you were, and where you are headed next. We communicate proactively so you can keep your eyes on the road ahead.

Financial Planning Services Include:

Investment Planning, Estate Planning, Income Tax Planning, Retirement Planning, Insurance Planning, Business Planning, Family Needs Planning, Financial Basics and Education

Level Four Advisory Services | LevelFourAdvisors.com | 866.834.1040