RETIREMENT AND SECURITY

Accumulate Your Wealth:
We determine and quantify your financial needs.

Grow Your Wealth:
We design investment strategies based on your goals and risk preferences.

Keep Your Wealth:
When planning, we look to minimize tax liabilities and to protect your family from unforeseen events.

Enjoy Your Wealth:
We help you find equilibrium between your income and your cash flow needs. We do the work and let you live your life.

Pass On Your Wealth:
We assist in planning the wealth transfer to people you care about with as much ease as possible.

VISION FINANCIAL PLANNING

6348 ALDERTON STREET | REGO PARK, NY 11374
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WWW.MYVISIONFINANCIAL.COM

Helping Our Clients Realize Their Aspirations

VISION FINANCIAL PLANNING

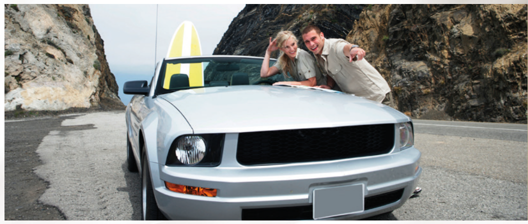
WELCOME

We work carefully to chart the way to help you achieve your financial dreams. We build and manage long-term relationships based on trust and communication. We take a team approach to advising clients on investment strategies and help develop sound financial plans.

UNDERSTANDING YOUR NEEDS

Determining your financial goals and creating an investment plan to help ensure your financial success is our top priority. We work closely with you to understand your current financial picture, as well as your needs and wants for the future.

Whether it's purchasing a new car or home, sending your kids to college, planning the next big trip, or preparing for a comfortable retirement, we're here to help make your dreams a reality.



MANAGING AND UNDERSTANDING

As an independent advisory firm, Vision Financial Planning has no proprietary products to offer. We don't work for a bank or an insurance company. We have the freedom to provide you with a wide variety of investment choices from among the best in the financial services industry. As an independent wealth management firm, we have comprehensive investment strategies, established wealth management services, and other resources to help guide you to your dreams.

INVESTMENT MANAGEMENT:

- We are adherents of Modern Portfolio Theory with a portion of assets managed using Tactical Asset Allocation.

RETIREMENT PLANNING:

- Quantifying of cashflow needs at retirement
- Reviewing the current retirement plan if one is in force
- Recommending adjustments to asset allocation and savings patterns
- Advice on 401(k) plans and IRA options
- Social Security filing advice

ESTATE PLANNING:

- Preserving your legacy for future generations
- With the help of a qualified attorney, we create and implement your estate plan

RISK & INSURANCE MANAGEMENT:

- We assess risks to your financial goals and help you plan ahead

WE'LL BE THERE WITH YOU EVERY STEP OF THE WAY...