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FINANCIAL PLANNING

1. **Tax Management:** Developing tax-efficient investment strategies to minimize tax liabilities and optimize after-tax returns for clients.
2. **Estate Planning:** Creating plans to transfer wealth to future generations while minimizing taxes and ensuring assets are distributed according to the client's wishes.
3. **Risk Management:** Evaluating insurance needs and recommending appropriate coverage to protect against unexpected events.
4. **Cash Flow Management:** Developing strategies to optimize cash flow, manage debt, and build savings.
5. **Financial Goal Setting:** Helping clients set and prioritize financial goals for a major purchase.