North Star Consultants of Texas

<<Financial Professional Name and Designations>>
<<Professional Title>>
<<Phone Numbers>>
<<Email Address>>

List of planning services

Financial position planning	Investment planning	Tax planning*	Insurance planning	Retirement planning	Estate planning*	Business financial planning
Goal tracking and accountability Budgeting Debt management strategies Net worth statements Real estate and asset review	Roth/Traditional IRAs Portfolio selection Self-employed retirement options College planning Risk tolerance review Rebalancing analysis Rollover education	Tax sensitive investments Tax loss harvesting Tax-deductible/deferred investments Tax diversification of assets Plan coordination with CPA Tax-efficient gifting strategies 1099 planning (S Corp and K1)	**COVERAGE REVIEW OF:** Life Annuities Disability Long-term care Property and casualty Auto	Social security planning 401k review Business benefits packages Review of employee stock purchase options Pension planning Deferred compensation plans Defined benefits plans Retirement projections	Access to trustee services Trust asset management Proactive tax-efficient gifting strategies Irrevocable life insurance trusts Legacy planning Wealth transfer strategies Beneficiary review	Group benefits plans Business evaluation and succession planning Corporate structure and distribution planning Human resources department support Buy/sell agreement Employee/Employer retirement options Employee financial planning 1099 planning (S Corp and K1)

North Star Professional Center – 2701 University Ave SE, Minneapolis, MN 55414 • Main: 612.617.6000 • Fax: 612.617.6001 • www.northstarfinancial.com

*Financial Advisors do not provide tax, legal, mortgage or real estate advice and this should not be considered as such. Please consult a tax, legal, mortgage or real estate professional for advice regarding your specific situation.