RETIREMENT PLANNING STRATEGIES FOR SOLO & SMALL FIRM ATTORNEYS

FIND OUT IF YOU'RE ON TRACK FOR RETIREMENT

WURZ FINANCIAL SERVICES

MY STORY

- Investment Advisor at Wurz Financial Services
- CERTIFIED FINANCIAL PLANNER™
- Master's degree in Financial Planning from Golden Gate University
- Specializes in working with solo & small firm attorneys

MY MISSION

To help solo & small firm attorneys like you:

- Maintain your desired lifestyle in retirement
- Avoid common financial pitfalls
- Pay less taxes
- Make better investment decisions
- Ensure you have enough income for you and your family in retirement

YOUR STORY

- You're a successful attorney
- You're 5 to 10 years away from retirement
- You're dedicated to helping your clients make smart decisions
- Now you need someone to help you make smart decisions about *your* future
- You have limited time and a complex financial situation
- You're looking for a professional to help you:
    - Bring clarity to your financial picture
    - Plan out your financial future
    - Manage your investments

3 ESSENTIAL STEPS TO RETIREMENT PLANNING FOR ATTORNEYS

PLAN WITH CARE. LIVE WITH COURAGE.

STEP 1: CREATE A FINANCIAL PLAN

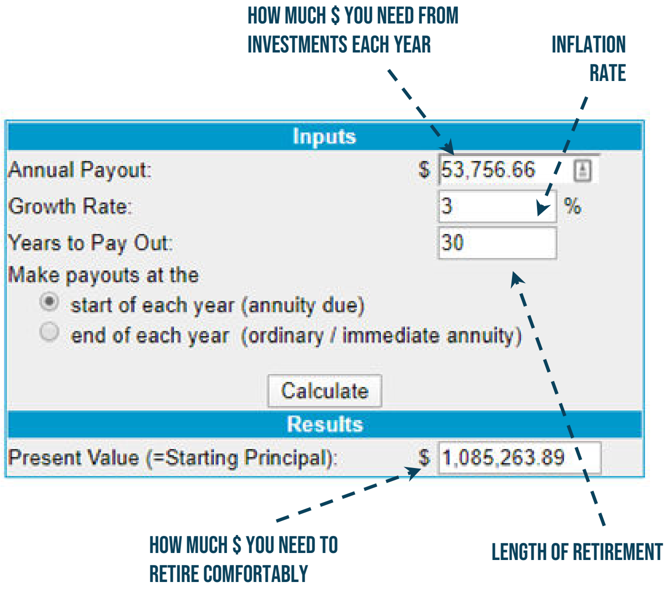
Define your short-term and long-term goals

- What do you want to accomplish while you're still working?
- What does your ideal retirement life look like?
- What are your family's values and legacy goals?

STEP 1: CREATE A FINANCIAL PLAN

Calculate how much money you need to retire

1. Determine your future expenses
   - Create a budget based on current expenses
   - Adjust categories to match retirement needs
2. Add up income streams & subtract from future expenses
   - Social Security, IRAs, rental income, etc.
3. Adjust your number for inflation
   - Use compound interest calculator
4. Calculate how much you need at retirement
   - Use present value annuity calculator



STEP 1: CREATE A FINANCIAL PLAN

- Prepare for unexpected personal and professional risks
    - Death, illness, disability, and professional claims
    - Make sure you have cost-effective insurance coverage

HOW WE HELP

- We help clarify your financial picture by:
    - Organizing and simplifying your financial life
    - Monitoring and tracking your progress using our powerful retirement planning software
- We create a plan for your future by:
    - Calculating your retirement income needs
    - Defining your ideal retirement lifestyle
    - Helping you retire how you want

STEP 2:

ENSURE YOUR INVESTMENT STRATEGY ALIGNS WITH YOUR FINANCIAL PLAN

- Your portfolio may be too conservative or too risky
- The key to sound investing is to make sure your portfolio is:
  - Properly allocated
  - Broadly diversified
  - Rebalanced regularly

HOW WE HELP

At Wurz Financial Services, we:

- Determine the optimal level of risk
- Watch over your investments daily
- Rebalance as needed

STEP 3. PREPARE FOR TRANSITIONS

If you plan on selling your firm to fund retirement, make sure you:

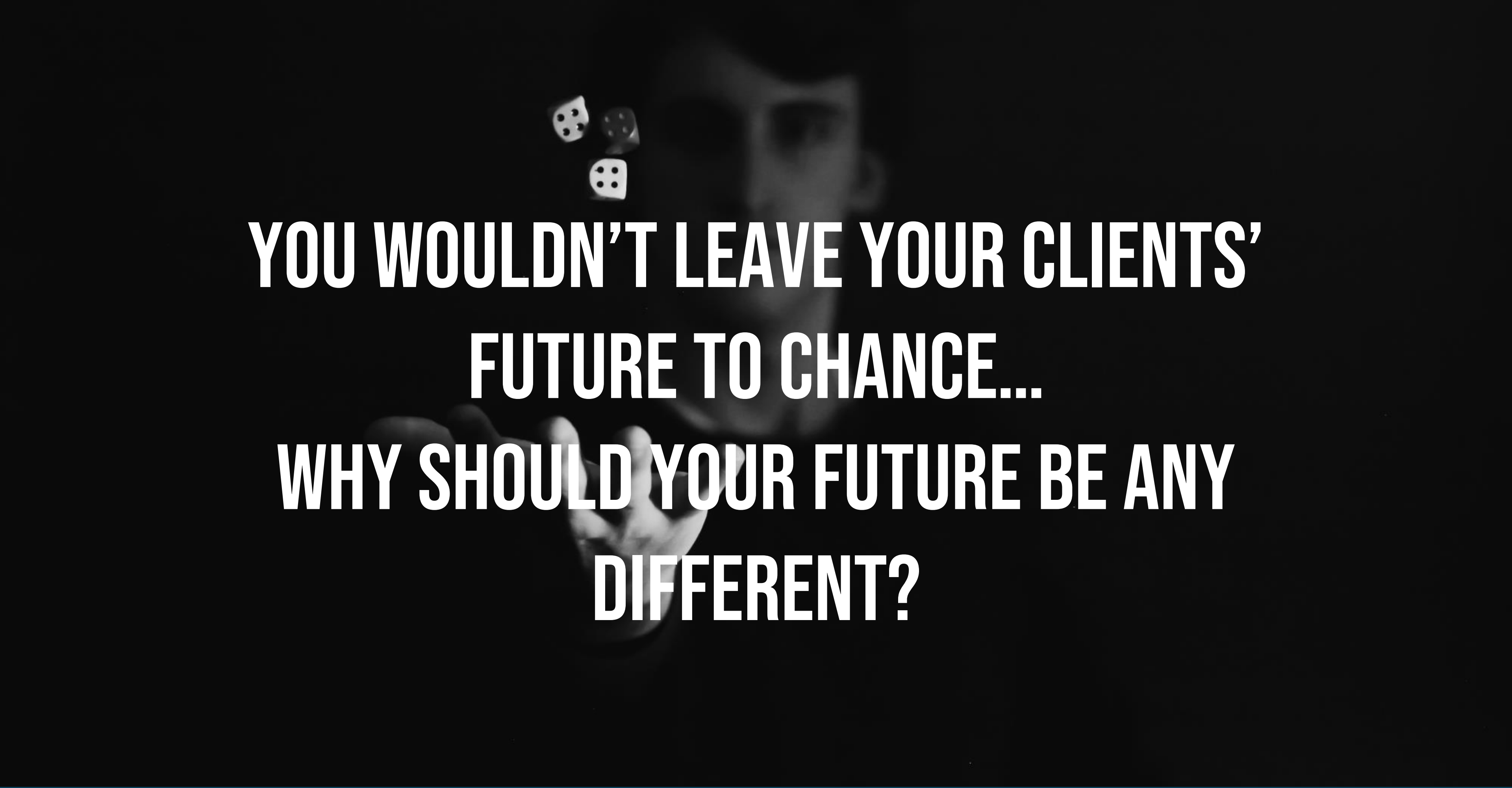
- Take steps to maximize the value of your firm
  - Get a ballpark estimate of what your practice is worth right now
  - Improve systems, raise rates, ask for client feedback, keep expenses in check, maximize profitability wherever you can
- Sell your firm the way you want
  - Have an associate buy you out
  - Sell your practice to a third party
  - Restructure your practice

HOW WE HELP

As advisors who specialize in serving solo & small firm attorneys, we can help you:

- Maximize your firm's value
- Determine the best way to sell your firm

You only get one chance to sell your law practice, make sure you do it right.



PLAN WITH CARE. LIVE WITH COURAGE.

LET US HELP YOU SECURE YOUR FINANCIAL FUTURE

Schedule a complementary 30-minute phone call where we:

- Review your retirement plan and investments
- Identify unexpected risks in your current plan
- Provide recommendations
- Answer your questions and concerns
    - Am I on track for retirement?
    - How much do I really need to retire comfortably?
    - Is it possible to sell my firm to fund retirement?

CLICK BELOW TO SCHEDULE YOUR COMPLIMENTARY MEETING

- Gain financial clarity
- Uncover if you’re on track for retirement
- Reserve your space now
- Spots are limited

SCHEDULE YOUR MEETING HERE: CALENDLY.COM/DARRENWURZ/30MIN

WURZ FINANCIAL SERVICES

STILL NOT SURE?

- Send us your questions:
  - dpw@fortunefinancialservices.com
- Visit our website:
  - wurzfinancialservices.com
- Read our blog:
  - wurzfinancialservices.com/blog.htm