



# FINANCIAL ENHANCEMENT



JERRY.LYNCH@ONEDIGITAL.COM | WWW.ONEDIGITAL.COM



REVIEW OF NON-QUALIFIED BENEFITS AND LONG-TERM COMPENSATION



FAMILY WEALTH & ESTATE PLANNING

- ANALYSIS OF CURRENT LEGAL DOCUMENTS
- ESTATE PLANNING STRATEGIES
- TOPLINE ASSET PROTECTION RECOMMENDATIONS



INSURANCE REVIEW

- REVIEW CURRENT POLICIES
- INSURANCE COVERAGE RECOMMENDATIONS
- ARTICULARY LONG-TERM CARE



INVESTMENT REVIEW

- 401K INVESTMENTS ANALYSIS
- OPTIONS + OTHER INVESTMENTS TO BEST FIT YOUR TAX BRACKET
- COMPLIMENTS TO HOUSEHOLD INVESTMENT ACCOUNTS
- RETIREMENT TARGET + SHORT AND LONG-TERM FINANCIAL GOALS



HOW WILL THIS COMPENSATION INCREASE CHANGE YOUR GOALS?

- AFTER TAX RAMIFICATIONS OF THIS ADDITIONAL \$\$\$
- HOW DO YOU USE THIS ADDITIONAL INCOME TO MAKE YOUR FINANCIAL GOALS ATTAINABLE