



ERICKSON FINANCIAL

Comprehensive Financial Services

Kristopher Erickson, Investment Advisory Representative

Our firm provides comprehensive financial services tailored for our clients' unique personalities, needs and situations. We work hand in hand with you to assess your goals, understand your priorities and develop a long-standing relationship built on trust.

Our goal is to partner with you to provide continuous counsel and help you pursue the life you and your family deserve. We start this by openly discussing the 8 Wealth Management Issues[®], which encompasses the financial challenges that affect everyone at some point in their lives.

Offering exceptional service and a holistic approach is the premise behind the services offered.

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FINANCIAL-The 8 Wealth Management Issues[®]

- Investment Management
- Cash Flow and Debt Management
- Family Risk Management (Insurance)
- Retirement Planning
- Education Planning
- Legacy Planning (Estate)
- Business Planning
- Special Situations Planning

TAX

- Individual Tax Planning & Preparation
- Business Tax Planning & Preparation
- Estate & Gift Tax Planning & Preparation
- IRS Representation

These are some situations where you might need advice:

- Change or leave job, begin collecting unemployment
- Before receiving a distribution from a 401k, IRA, or pension plan
- Buy or sell a house or rental property
- Receive an inheritance
- Sell or redeem more than \$2000 in stocks, bonds, or mutual funds
- Start, sell, or close a small business
- Giving or receiving a gift over \$14,000
- Retire or start receiving Social Security
- Have a new child
- Have a change in your marital status
- Receive a notice from the IRS or State Department of Revenue
- Anytime your investment horizon changes

Want an opportunity to talk or get a second opinion? Call me and set a no cost appointment!

Kristopher Erickson is a Registered Representative. *Securities offered through HD Vest Investment ServicesSM, Member SIPC, Advisory Services offered through HD Vest Advisory ServicesSM. Erickson Financial is not a registered broker/dealer or independent investment advisory firm.