Your Financial Plan Should Include

Cash Flow
Identifying your spending habits now will help us determine cash flow in retirement.

Savings
A secure, manageable future includes savings for the expected and unexpected.

Risk Management
Make sure the various levels and types of insurance you carry will align with your overall needs and goals. As a low-risk investment, insurance can also be used as an alternative revenue stream.

Education Funding
Education is often one of the largest expenses families incur, so it's key to explore savings options.

Retirement Planning
Considering Social Security benefits, employer-sponsored plans, and your personal investment portfolio, decide which balance of financial instruments will serve you best.

Get started today by scheduling a free consultation!

Call ***(888) 449-6030*** or visit the website at ***traviscu.org/tfs***

TRAVIS FINANCIAL SERVICES

Mailing Address
2020 Harbison Drive
Vacaville, CA 95687

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Investment Planning

Focus on what's important to you

TRAVIS FINANCIAL SERVICES

We begin by helping you identify your financial goals and evaluate where you are relative to those objectives.

We evaluate your options and recommend strategies to help you get you where you want to be. And we don't stop there. We help you implement the recommendations, too. Then, we continually monitor your financial situation to ensure you remain on track to pursue your financial dreams.

Discovery Process

We work with you to create a personalized financial strategy that supports your objectives. TFS has expanded its services to help with:

- Retirement Planning
- Distribution & Education
- Investment Planning
- Estate Planning
- Education Planning
- Tax Strategies
- Gifting Strategies
- Risk Management
- Business Strategies

TFS Product Solutions through LPL Financial

401(k)s & Transition Assistance

Specialized Money Management Programs

Mutual Funds

Fixed & Variable Annuities

Business Retirement Planning

Stocks & Bonds

Real Estate Investment Trusts (REITs)

Individual Retirement Account (IRAs)

Regular, Roth, or Educational IRAs

Life & Long Term Care Insurance

Unit Investment Trusts

TFS Process

The goal of the financial planning process is to give you control of your financial circumstances, enhance your quality of life, and reduce uncertainty about your future.

We follow these steps to help you create a plan to work toward your financial freedom.

1. Identify Your Objectives
2. Analyze Your Current Situation
3. Research & Prepare Your Plan
4. Review Your Plan & Options
5. Implement Desired Strategy
6. Review Your Progress