Brookfield Tax Planning, LLC | 9300 W Ogden Ave, Brookfield, IL 60513 | info@brookfieldtaxplanning.com |
708-485-3439 | www.brookfieldtaxplanning.com |

Why Choose A Comprehensive Tax And Financial Plan?

- Significantly reduce income taxes now and in the future
- Objective review of your complete financial situation (second opinion)
- Coordinate and integrate ALL areas of your finances so you can make educated financial decisions
  decisions instead of guessing or winging it. We will provide:
    - Tax reduction planning/projections
    - Retirement security planning/mitigate inflation and evaluate high-risk investments
    - Asset diversification/risk analysis, prevent loss of nest egg/safe money
    - Business ownership, coordinate with personal finances/compensation planning
    - Estate/inheritance planning
    - Education planning/funding
    - Insurance planning/review
- Cash flow/retirement income projections, discover if you have enough income to live the lifestyle you wish throughout your lifetime
- Keep your money safe with tax-advantaged, guaranteed vehicles...yet have the potential for your funds to grow and fight inflation
- Independent, objective tax and financial planning professionals WORK FOR YOU, not a brokerage firm, insurance company, or a bank...who may have other agendas
- **MONEY BACK GUARANTEE**

Step-by-Step Process

1 Gather Financial Information – Documents Checklist ✅

PLEASE PROVIDE YOUR MOST RECENT STATEMENTS OR INFORMATION REGARDING:

- ✓ Tax Returns
- ✓ Brokerage Accounts
- ✓ Digital Assets
- ✓ IRA / 401(k) / Other Retirement Accounts –
- ✓ Real Estate Owned (Values & Loans)
- ✓ Cash Accounts: checking, CDs, money market, savings, Treasury bills
- ✓ Life Insurance & Annuities, Homeowners/Renters, Auto Policies
- ✓ Business P&L (if applicable)
- ✓ Other Assets & Liabilities

2 Initial Consultation

- Meet to discuss goals, family, business (if applicable), and plans. Mutually decide if planning is right for you. If we can't help you, or you don't feel this is for you, then that's that. No pushy sales pressure, everyone hates.

3 Plan Preparation

- Written plan with projections, options & potential solutions
- Highlights areas for updates or adjustments

4 Review & Implementation

- Meet to review & discuss options
- Modify plan as needed
- Assist in implementing recommendations
- **YEAR-ROUND STRATEGIC PLANNING WITH NO HOURLY FEES**

“*Financial And Tax Planning Made Simple – Compare Your Options*”

Feature	DIY	CPA	Financial Advisor / Brokerage Firm	Brookfield
Annual Tax Return Preparation	✓	✓	❌	✓
Proactive Tax Reduction Planning	❌	❌	❌	✓
Retirement Income Security Planning	❌	❌	✓	✓
Coordinated Tax & Financial Planning (Lifetime Strategy)	❌	❌	❌	✓
Written Comprehensive Integrated Plan	❌	❌	❌	✓
Business & Personal Finance Integration	❌	⚠️ Tax-Only	❌	✓
Asset Protection & Risk Review	❌	❌	⚠️ Partial	✓
Estate Planning Coordination	❌	❌	❌	✓
Complete Insurance Review	❌	❌	❌	✓
Year-Round Strategic Support	❌	❌	✓	✓
Safe, Guaranteed Money Analysis	❌	❌	❌	✓
Education Planning & Funding Strategy	❌	❌	❌	✓
Objective, Conflict-Free Advice	❌	❌	❌	✓
Money-Back Guarantee	❌	❌	❌	✓

REMEMBER, PEOPLE DON’T PLAN TO FAIL…THEY SIMPLY FAIL TO PLAN!

Next Steps

1. 📅 Schedule your free, no-obligation initial consultation
2. 📁 Gather required documents
3. 📝 Meet for initial interview
4. ✅ Decide if you wish to receive year-round tax and financial planning or not
5. 🤝 Receive your personalized written plan
6. 🧾 Work together all year with no hourly fees

Call us NOW at: **708-485-3439** to make your **FREE, NO-OBLIGATION** tax reduction and financial planning appointment. If you have a partner or a trusted family member, it is a really good idea for you both to come in. I look forward to meeting with you soon!

Jeffrey Paul, Chief Strategist and Planner
Brookfield Tax Planning, LLC