

Aspyre

WEALTH PARTNERS

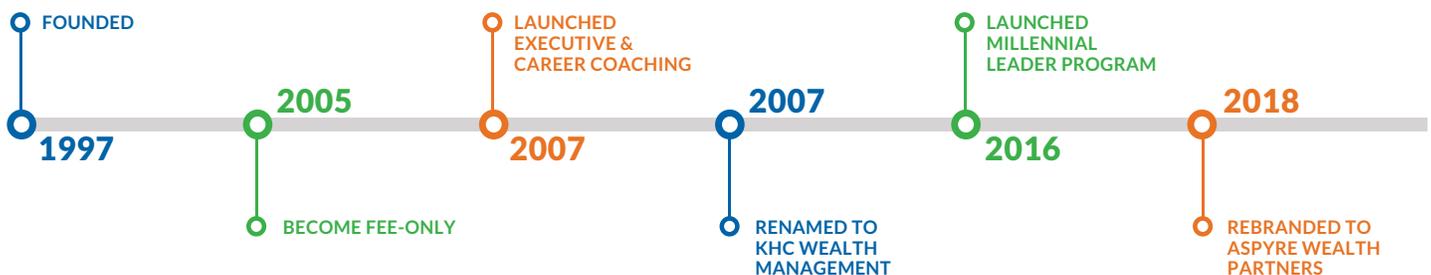
Master What's Next

YOUR PARTNER IN LIVING THE LIFE YOU WANT.

At Aspyre Wealth Partners, we help people master what's next with their money, career and lifestyle. Our advisors guide you through life transitions like getting married, sending kids to college and retirement. As a fee-only firm, our fiduciary duty is to provide financial planning, career coaching and investment advice based on what's best for you. Dreaming of something more? Let's master what's next and make it happen.

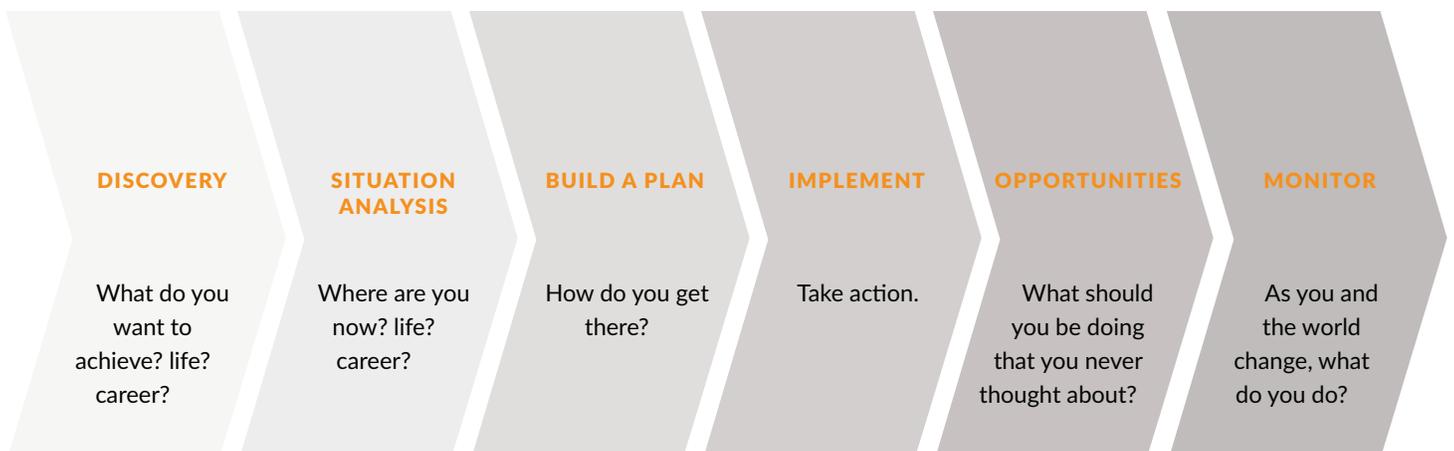
FINANCIAL PLANNING | CAREER PLANNING | INVESTMENT MANAGEMENT

FOR TWO DECADES: MASTERING WHAT'S NEXT



OUR APPROACH

Our approach starts with helping you clarify your goals and how you define success.





THINK OF US AS YOUR PERSONAL CFO

Are you grappling with any of the following questions?

- Am I on track to retire and reach my other goals?
- Am I maximizing my career opportunities?
- Am I doing the right things financially?
- Am I making the best decisions with the elements of my compensation and benefits packages?
- How do I plan for the unexpected?

To address these and other concerns, we help you with ongoing comprehensive planning. Your customized plan may include:



Financial Independence

- Short and long-term trade-offs
- Retirement cash-flow scenarios
- Social Security planning



Complex Compensation

- Coordinate with other savings
- Tax consequences
- Equity pay diversification strategies
- Deferred compensation



Tax Planning

- Annual tax projections
- Tax savings strategies
- Withholding & estimated tax plans
- Tax-sensitive investing



Education Funding

- Coordinate funding with other goals
- Appropriate funding vehicles
- College funding projections



Career

- Accelerate career
- Find "what's next"
- Review employment offers
- Retirement readiness



Risk Management

- Strategies to mitigate career risk
- Life and disability needs analysis
- Review existing policies
- Long-term care plans



Legacy and Estate Planning

- Annual tax projections
- Tax savings strategies
- Withholding & estimated tax plans
- Tax-sensitive investing



Savings & Investments

- Spending & savings targets
- Allocation/diversification
- Ongoing monitoring
- Cash flow projections



10000 College Boulevard, Suite 260
Overland Park, KS 66210
Phone: 913-345-1881
info@AspyreWealth.com



Fee **FO** Only

