Northeast Planning Associates, Inc.

Gary W. Pelletier, CLU, ChFC, CFS, AIF®

Wealth Planner

Consulting Services

Financial Planning Level	Wealth Advisory Level	Private Client Group Level	
✓	✓	✓	Written plan designed to organize and simplify your life
✓	✓	✓	Specific advice in all areas of personal finance
✓	✓	✓	Referrals to specialist advisors
✓	✓	✓	Investment allocation recommendations
✓	✓	✓	Review Employer Benefit Options
	✓	✓	Advice on implementing financial recommendations
	✓	✓	Individually customized portfolio strategies
	✓	✓	Access to institutional money managers
	✓	✓	Periodic portfolio evaluations
	✓	✓	Periodic consultations regarding personal finances
	✓	✓	Pension Maximization Planning
	✓	✓	Ongoing support by financial planning team members
		✓	Lifetime income distribution strategies
		✓	On-going consultations regarding dynamic and complex issues
		✓	Planning for families with special needs
		✓	Estate planning strategies - Elder Care planning
		✓	Direct assistance working with specialist advisors
		✓	Direct access to advisor between quarterly meetings
		✓	Annual retesting of plan assumptions

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Financial Planner offers advisory services through Northeast Planning Associates, Inc. (NPA), a registered investment adviser. Securities and advisory services offered through LPL Financial, member FINRA/SIPC. NPA and LPL Financial are not affiliated. 07-242