

HORAN Capital Advisors

The Planning Process

Health.
Wealth.
Life.

In Pursuit of What Matters Most.



Financial Planning
Estate Planning
Investment Management
Insurance

Most financial decisions are made at the time of significant life-altering events, such as the sale of a business, retirement or addition to the family.

Our mission is to understand and guide you through these transitions, reduce your complexity and set a measurable path for your future.

A complex plan is structured to give both unbiased and objective advice tailored to meet your needs. A typical financial plan may include the following customized components:

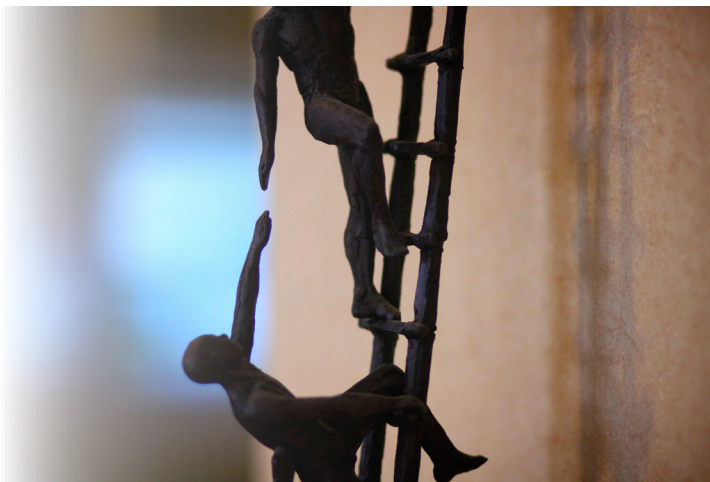
- Customized Net-Worth Statement
- Retirement Projections/Cash Flow
- Risk Analysis Review
 - Life Insurance
 - Disability Coverage
- Investment Allocation
 - Asset Mix and Risk Management
 - Stock Options
- Tax Savings Strategies
- Monte Carlo Simulation
- College Planning
- Estate Planning
 - Charitable Giving
 - Business Continuity

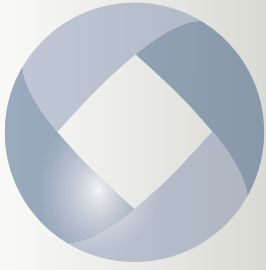
*See reverse side for necessary inputs to complete a comprehensive plan.

About HORAN

The daily work at HORAN originates from a belief that three things matter most to our clients: access to quality, affordable health care, the ability to build long-term wealth and the counsel to achieve financial goals and protect assets for a lifetime.

HORAN's Wealth Management Team provides personalized solutions to grow, protect and transfer wealth. Our experts provide ongoing guidance, insight, and investment monitoring with a steady hand and complete objectivity.





Information and Documentation Needed To Complete a Comprehensive Financial Plan

- ◆ Your Date of Birth
- ◆ Marital Status (If Married, Spouse Name with Date of Birth)
- ◆ Children (Include Dates of Birth)
- ◆ Employment Information (Employer, Position)
- ◆ Salary, Bonus, Other Income Considerations
- ◆ Retirement Date Objectives (Net Income Need, Date of Retirement)
- ◆ Insurance Policies (Include Statements: Life, Disability, Long-term Care)
- ◆ Social Security Benefit
- ◆ Pension Benefits (Lump Sum and/or Annual Benefit)
- ◆ Significant Liabilities (Mortgage, School Loans)
- ◆ Non-Liquid Assets (Business Ownership, Houses, Partnerships)
- ◆ Investments (Include Statements: Taxable/Retirement Accounts, Deferred Compensation, Cash, Annuities, 529s)
- ◆ Anticipated Inheritance (Please estimate a date)
- ◆ Legal Documents (Include Copies: Wills, Trusts, Health Care POA, Durable POA)
- ◆ Other Advisors (Attorneys, CPAs, Bankers)
- ◆ Any Current Investment Policy Statements
- ◆ Other Considerations

