The Hunter Group

A Division of United Capital Financial Advisers, Inc.

Family Wealth Management

Your Plan

Written Financial Plan

The written comprehensive Financial Plan addresses your current financial situation, your desired objectives, and **specific, personalized strategies** available to achieve those objectives. The Financial Plan includes the following schedules:

- Schedule of Financial Objectives and Assumptions
- Investment Summary
- Retirement Planning Schedule
- Educational Funding Schedules, if applicable
- Estate Planning Schedule
- Insurance Needs Analysis (Life/Disability/Auto/Homeowners/Personal Liability)
- Fringe Benefit Planning and Analysis
- Financial Statement and Net Worth
- Income Tax Statement, including comparison to current withholding/estimated tax payments
- Cash Flow Statement
- Financial Plan Summary, which lists the actions needed to implement your Financial Plan
- Home Mortgage/Real Estate Analysis
- Business Continuity Plan
- Stock Option Schedule, if applicable

Investment Summaries

Below outlines a brief listing of included schedules in the Investment Summary of your plan.

- Asset Allocation Schedule
- Investment Asset Basis Schedules
- Consolidated Investment Holdings Statement
- Allocation Report
- Risk Analysis
- Individual Security Analysis
- Investment Recommendations
- Internal Rate of Return Report
- Current Market Review Letters - PPS accounts only

Additional Services

We assist you with every aspect of your financial life. Here are some additional services we provide:

- Coordination and assistance with annual tax preparation.
- Coordination and assistance with estate planning attorney and appropriate asset transfers.
- Assistance with mortgage refinancing.

Fraudulent websites (phish or spoof websites)
We urge you to protect your online financial activity and deal only with firms you know to be legitimate. Online fraudsters may attempt to direct you to fraudulent websites via email and pop-up windows. These websites are used to try to steal your personal information. One way to detect a phony website is to consider how you got to the site. You may have followed a link in a fraudulent email requesting your personal information. Therefore, you should not click on any links in suspicious emails or pop-up windows. Please be aware that this site is the only official website of United Capital Financial Advisers Inc. (UCFA) , United Capital Financial Partners, Inc. (UCFP) and its affiliates. We do not allow other websites to affiliate with us, and you should not trust any other websites which claim to be affiliated with UCFA.