GCU Wealth Advisors

Investments • Retirement • Insurance

Products and Services

At GCU Wealth Advisors, we provide expert assistance in the following areas:

Social Security and Medicare

- Understanding Social Security
- Social Security Retirement Benefits
- Social Security Disability Benefits
- Understanding Medicare Parts A, B, C & D
- Enrollment in Medicare Health Plans
- Medicare Prescription Drug Coverage
- Choosing the Best Medicare Plan For You
- Dual Eligible Medicare/Medicaid Plans
- Individual and Group Health Insurance
- Individual and Group Medicare Health Insurance
- Dental Plans

Investment Planning

- Investing Basics (Brokerage Accounts, etc.)
- Setting Investment Goals
- Designing and Managing Investment Portfolios
- Handling Market Volatility
- Asset Allocation and Diversification
- Taxable vs. Tax Free Investing
- Stocks
- Bonds
- CDs
- Mutual Funds/ ETFs
- Access to Top Professional Money Managers
- Multi-Disciplined Discretionary Strategies
- SEI Private Trust Company

Retirement Planning

- IRAs (Educational IRAs, Traditional IRAs, Roth IRAs, SEP IRAs, Simple IRAs)
- Employer Sponsored Retirement Plans
- Annuities
- Strategies for Retirement Plan Distributions
- Saving for Retirement
- Planning for Income in Retirement

Business Planning

- Starting or Buying a Business
- Choosing a Business Entity
- Business Insurance
- Business Tax Planning
- Retirement Plan Options
- Business Succession
- Business Group Health Plans
- Business Group Medicare Plans

2669 Post Road • Warwick, RI 02886-3076 • www.greenwoodcu.org
Phone – 401.562.2743 • Fax – 401.739.5596

GCU Wealth Advisors

Investments • Retirement • Insurance

Insurance Planning

- Protecting Your Loved One with Life Insurance
- Estimating your Life Insurance Needs
- What Type of Life Insurance are Best for You?
- Creating and Estate Plan with Life Insurance
- Long-Term Care Options
- Financial Impact of Disability
- Disability Income Insurance
- Individual and Group Health Insurance
- Individual and Group Medicare Health Insurance

Tax Planning

- Bookkeeping Services
- Income Tax Planning
- Year-End Tax Planning
- Investment Tax Planning
- Alternative Minimum Tax (AMT)
- Gift and Estate Taxes

Estate / Generational Planning

- Wills and Trusts
- Planning for Incapacity
- Creating and Preserving a Family Legacy
- Using Life Insurance in Estate Planning
- Strategies to Minimize Estate Taxes
- Charitable Gifting Strategies

Education Planning

- Saving for College
- 529 Plans
- Financial Aid
- Student Loans
- Repaying Student Loans
- Education Tax Credits and Deductions

Personal Finance

- Budgeting and Cash Reserves
- Establishing and Maintaining Credit
- Credit Cards
- Homeownership
- Buying or Leasing a Car
- Identity Theft

Life Events: Expected or Unexpected

- Buying a Home
- Getting Married
- Raising a Family
- Child with Special Needs
- Changing Jobs
- Starting a Business
- Caring for an Aging Parent
- Getting Divorced
- Death of a Family Member
- Veterans Benefits

2669 Post Road • Warwick, RI 02886-3076 • www.greenwoodcu.org
Phone – 401.562.2743 • Fax – 401.739.5596