ONE SIZE DOES NOT FIT ALL...
IT BARELY FITS MOST.

We custom design solutions to guide our clients "to and through their retirement year's". With this careful attention, you will never feel the need to go anyplace else to have your financial, investment, life, and health insurance needs met. We believe our partnership approach will build trust you can rely on.

WE ARE WITH YOU EVERY STEP OF THE WAY.

Investment Strategies

- **Medicare Insurance Plans Including**
  - Medicare Supplements and MedAdvantage Plans
  - Dental Plans
  - Vison Plans
  - RX Plans
- **Life Insurance**
  - Index Universal Life
  - Term Insurance
  - Long Term Care
- **Annuities**
  - Fixed Index Annuities
  - Fixed Annuities
- **Fiduciary Level of Investment Planning Includes**
  1. Portfolio Review
  2. Portfolio Stress Test
  3. Retirement Income Planning
  4. Roth Conversion Strategies
  5. Social Security Planning
- **Estate Planning**
  - i. Living Trusts
  - ii. Dynasty Trusts
  - iii. Wills
  - iv. Powers of Attorney

YOU HAVE QUESTIONS – WE HAVE ANSWERS

It all starts with a phone call:
509.467.5117

INTEGRATED FINANCIAL SERVICES OF WASHINGTON, INC.

OUR MISSION

We partner with our clients at every stage of life to find positive solutions for reaching financial goals. We do this by providing timely information consistently while keeping our client's heart at the center of every decision made.

"Doing the right thing for the right reason"

....while keeping our client's **goals** at the center of every **recommendation.**

QUESTIONS TO PONDER

- What are my retirement goals and am I on track to meet those goals?
- How is my IRA working for me?
- Do I still have a 401k with a former employee?
- How does Social Security and Medicare impact me at this time?
- Have I completely covered my options as they relate to my medical coverage when I turn 65?
- Are there better options for me regarding my individual medical coverage?
- Should I consider Long Term Care Insurance for me or my spouse?

Life Insurance questions;

i. Do I have the "old type" of life insurance?
ii. Is my "Term Insurance" about to run out?
iii. Does my life insurance include "Living Benefits"?

- Am I comfortable with market volatility or do I want to play safer with my investment nest egg?
- Are there ways I can participate in the market and increase my protection from volatility at the same time?

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