FELICIANO FINANCIAL

AREAS OF EXPERTISE

Investment Planning

With your income plan in place, we'll help you create an investment plan for the remaining assets that you do not need to draw from on a month to month basis. This can include:

- Assessing your risk tolerance
- Adjusting your portfolio to reduce or eliminate fees
- Evaluate ways to reduce risk while still accomplishing your goals
- Comprehensive evaluation of investment managers

Tax Planning

Your comprehensive retirement plan must include a suitable strategy to address taxes. This includes

- Assessing the taxable nature of your current holdings
- Strategies to include tax-deferred or tax-free money in your plan
- Strategies to determine which tax categories to draw from first, to reduce your tax burden
- Leverage your qualified money to leave potentially tax-free dollars to your beneficiaries

Legacy Planning

It's important to make sure your remaining assets - assets you've worked so hard for - go to your beneficiaries, and not to taxes. By working collaboratively with a Qualified Estate Planning Attorney.Our goal is to help you:

- Maximize your estate and income tax planning opportutnies
- Protect any assets in trust and make sure they are distributed to your beneficiaries probate free
- Protect your IRA and qualified accounts from becoming fully taxable to your beneficiaries

Health Care Planning

We'll create a plan designed to help you protect yourself against rising healthcare costs. This includes:

- Looking at all aspects of Medicare parts A, B, C, and D medicine
- Analyzing options for a long term care plan and or health insurance
- Looking at health insurance

MEET ADAM TODD

I love the relationships that I have built over the years with a lot of really good people. I am always humbled when a couple, family, or individual let me into the very intimate world of their personal financial decision-making. You really get to know people on a deep level when you go to that place with them. You get to know their fears, their hopes and dreams, the things they are most proud of, and sometimes even the things that they regret. What I do is a tremendous blessing and a great responsibility! I hope that my clients feel that I am set apart by my sincerity and honesty. I hope they genuinely feel at ease working with me because they know they can trust me with some very important and pivotal decisions.

What got you into planning?

When I was first out of college and just married, Jodi and I met with a financial planner. I thought that what he did was a very interesting job and that I could see myself doing someday. A few years later, I was looking to make a career change and decided to give it a shot. I worked for a few firms in the Dallas area before finding my way back out to Tyler and hooking up with Feliciano Financial Group. I have been here since 2010, and have loved every minute!

How long have you been in the business?

13 years. I have some graduate work in finance as well as several different securities and insurance licenses (including the Series 7, Series 6, Series 63, Series 65, and Group 1 Life and Health License).

TEAM OF TEAMS APPROACH

Behind your advisor is a team of experts. By following our proprietary Feliciano Financial Blueprint Process, we help you organize and simplify your finances. The Feliciano Financial Blueprint Process is designed to streamline the process so that you can focus on the goals and dreams that are important to you.