

Feel confident  
— *and spiritually at peace* —  
about **your financial future**



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Empower yourself  
*Spiritually & Financially*

Call our office at  
**919.554.0080**  
and let's talk!



We are an independent financial services firm helping individuals create retirement strategies using a variety of investment and insurance products to custom suit their needs and objectives.

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# Who we are

Everyone sees finances in a different way, and Carlson Financial Services is no exception to that. We believe you are the steward of your financial household. Our role is to provide the planning framework for you to make financial decisions consistent with your faith and values. Here, you are the focus. Working with Carlson Financial Services means working with a team who cares. Your needs, objectives and desires are always the priority. Our mission is to provide a platform where you can align your giving, spending and savings to be consistent with your faith and your family's priorities. We're here to help you make a plan for your future, and we'll be with you every step of the way.

# Get to know the process

## Cash management and reserves.

Cash-flow system and adequate and appropriate cash reserves.

## Tax diversification.

Current tax control and suggested tax diversification.

## Investment Management.

Current asset allocation, tactical and strategic asset allocation, risk management and suggested allocation.



At Carlson Financial Services, our process includes examining the six key areas of financial planning from first, a spiritual perspective and then from a mechanical perspective. This allows you to have a comprehensive plan that prioritizes and monetizes your goals and creates an implementable action plan.

## Protection planning.

Premature death, disability and long-term care.

## Retirement and redirection.

Projections and what-if scenarios.

## Estate design.

Wealth transfer and estate analysis.

# How we can help

As an independent firm, Carlson Financial Services understands each client is unique, which is why our approach takes into account your particular goals and objectives, allowing us to customize each area of your financial strategy.

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## *Here's what Carlson Financial Services can offer you:*

- Fee-based Financial Planning.
- Fee-based Asset Management.
- Insurance Services.
- Biblical Financial Stewardship Workshops.



How can  
**Carlson  
Financial  
Services** be of  
service to you?

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