

# We Invest Into Every Client With Analysis, Education and Goal Setting

## Retirement Income Analysis



### WHAT WE OFFER...

- Income / Retirement Analysis
- Investments Review (Fee / Risk)
- Social Security Maximization
- Tax Planning Optimization
- Insurance Options / Review
- Asset Protection Solutions
- Estate Planning Education

There is No Cost for analysis and education strategy meetings. Our level of service is part of who we are and how we earn referrals.



Check Us Out Online  
[www.birdseyefinancial.com](http://www.birdseyefinancial.com)

# IMPORTANT

# Retirement INCOME PLANNING Strategies



# Retire Well

# LIVIN' THE DREAM

# Corbin Lindsey



## OUR GOALS

- 1 Build lasting client relationships
- 2 Offer Lifetime Income Solutions
- 3 Utilize Safe Money Options
- 4 Reduce investment Risk / Fees
- 5 Educate on Tax saving strategies
- 6 Asset Protection Risk Reduction

*"I educate clients how to Optimize retirement funds through proven strategies that can make a difference!"*



**BIRDSEYE FINANCIAL**  
INSURANCE - INVESTMENTS - PLANNING  
[www.birdseyefinancial.com](http://www.birdseyefinancial.com)

**360-722-7889**

*Birdseye Financial offers a full range of financial products and services. We believe that tax planning, retirement planning, and estate conservation should be top priorities for individuals of all levels during retirement. Because so many people regard financial strategies as complex and confusing, they often miss out on financial opportunities. They tend to take unnecessary risks and fail to adequately protect their assets.*

### TAXES IN RETIREMENT WORKSHOPS

*Birdseye Financial has specialized in helping clients look at methods that will reduce or eliminate many taxes such as income tax, capitol gains tax, Social Security taxes, and estate tax. **Get a copy of your TAX MAP!!!***

### ABOUT BIRDSEYE FINANCIAL

*For over 16 years, we have been a complete advisory agency offering both RISK and SAFE investment options and strategies.*

## WHAT WE DO

### Planning Services (No Cost Service)

- Income / Retirement Analysis
- Investments (Risk and Fee Analysis)
- Social Security Optimization
- Pension Maximization
- Tax Strategies (**The TAX MAP**)
- Asset Protection Solutions
- Estate Planning Education

### Insurances Products

- Medicare Coverage
- Life / Final Expense
- Long-Term Care Solutions

### Investment Products

- CD Alternatives
- Safe Money Options
- Risk Money Options (Thru S.I.M.)
- Annuities (Fixed Index)
- IRA's, 401(k), 403(b), 457
- TSP (Thrift Savings Plan)
- RMD (Required Minimum Dist.)

***"Our financial solutions are as unique as our clients"***