

First Financial Center of Dallas

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CURT LADD, CFP

Services Provided

- ❖ Comprehensive Financial Planning
- ❖ Self Direction of 401K Plans
- ❖ Family Protection Planning in case of Premature Death
- ❖ Income Protection Planning in case of Disability
- ❖ Asset Protection Planning
- ❖ Investment Analysis, Recommendations, and Implementation
- ❖ Retirement Asset Accumulation Planning (including company-sponsored retirement plans)
- ❖ Employee Benefits
- ❖ Debt Reduction, Reconstruction and Debt Elimination Planning
- ❖ Professional Resource Recommendations
- ❖ Income Budgeting
- ❖ Tax Planning
- ❖ Estate Tax Planning
- ❖ Charitable Gifting
- ❖ Educational Funding for Children and Grandchildren
- ❖ Retirement Distribution Planning and Asset Preservation
- ❖ Retirement Plan Rollovers to Self Directed IRA's
- ❖ Long Term Care Planning

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