



Answering the Financial Questions that Count

The topics listed below are intended to cover a variety of situations--more than any one household will ever likely need to consider. All of the information available is offered to help you understand your current financial situation and make informed decisions. Simply fill out the form (online or on paper) and return it to request information on the subjects that interest you.

Send information on checked items to:

Name _____

E-mail _____

Address _____

City _____

State _____ ZIP Code _____

Business phone _____

Home phone _____

Best time to call _____

Business Planning

- Starting or Buying a Business
- Choosing a Business Entity
- Business Insurance
- Business Tax Planning
- Retirement Plan Options
- Business Succession

Personal Finance

- Budgeting and Cash Reserves
- Establishing or Maintaining Credit
- Credit Cards
- Homeownership
- Buying or Leasing a Car
- Identity Theft

Education Planning

- Saving for College
- 529 Plans
- Financial Aid
- Student Loans
- Repaying Student Loans
- Education Tax Credits and Deductions

Insurance Planning

- Protecting Your Loved Ones with Life Insurance
- Estimating Your Life Insurance Needs
- What Type of Life Insurance Is Best for You?
- Creating an Estate Plan with Life Insurance
- Long-Term Care Options
- Financial Impact of a Disability

Estate Planning

- Wills and Trusts
- Planning for Incapacity
- Creating and Preserving a Family Legacy
- Using Life Insurance in Estate Planning
- Strategies to Minimize Estate Taxes
- Charitable Gifting Strategies

Retirement Planning

- IRAs
- Employer-Sponsored Retirement Plans
- Annuities
- Strategies for Retirement Plan Distributions
- Saving for Retirement
- Planning for Income in Retirement

Social Security and Medicare

- Understanding Social Security
- Social Security Retirement Benefits
- Social Security Disability Benefits
- Medicare
- Medicare Prescription Drug Coverage

Tax Planning

- Income Tax Planning
- Year-End Tax Planning
- Investment Tax Planning
- Alternative Minimum Tax (AMT)
- Gift and Estate Taxes

Other

If you want information about something not listed here, tell us below what you are looking for.

Investment Planning

- Investing Basics
- Setting Investment Goals
- Designing and Managing an Investment Portfolio
- Handling Market Volatility
- Asset Allocation and Diversification
- Taxable vs. Tax-Free Investing
- Stocks
- Bonds
- CDs
- Mutual Funds/ETFs
- Separately Managed Accounts

Life Events

- Buying a Home
- Getting Married
- Raising a Family
- Child with Special Needs
- Changing Jobs
- Starting a Business
- Caring for an Aging Parent
- Getting Divorced
- Death of a Family Member

There are no warranties implied.

White Aspen Capital is a registered investment adviser located in Henderson, Nevada. White Aspen Capital may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements. Whiteaspen.com is limited to the dissemination of general information pertaining to its advisory services, together with access to additional investment-related information, publications, and links. Accordingly, the publication of White Aspen Capital web site on the Internet should not be construed by any consumer and/or prospective client as White Aspen Capital solicitation to effect, or attempt to effect transactions in securities, or the rendering of personalized investment advice for compensation, over the Internet. Any subsequent, direct communication by White Aspen Capital with a prospective client shall be conducted by a representative that is either registered or qualifies for an exemption or exclusion from registration in the state where the prospective client resides. For information pertaining to the registration status of White Aspen Capital, please contact the state securities regulators for those states in which White Aspen Capital maintains a registration filing. A copy of White Aspen Capital's current written disclosure statement discussing White Aspen Capital's business operations, services, and fees is available at the SEC's investment adviser public information website – www.adviserinfo.sec.gov or from White Aspen Capital upon written request.

This newsletter and information are provided for guidance and information purposes only. Investments involve risk and unless otherwise stated, are not guaranteed. Be sure to first consult with a qualified financial adviser and/or tax professional before implementing any strategy. This website and information are not intended to provide investment, tax, or legal advice.

