

An hourglass with sand falling from the top bulb to the bottom bulb, and a stack of coins next to it. The hourglass is made of clear glass and has a small amount of sand in the top bulb. The stack of coins is made of silver coins and is stacked in two columns of different heights. The background is a solid orange color.

How PrairieFire Saves Time for Families and Business Owners

WE CAN HELP FAMILIES AND BUSINESS OWNERS

Save UP TO 100 hours/year (2 weeks of time)!

Investment Management

50 hours/year

Automatic Portfolio Rebalancing

- Regularly adjusts investments to maintain desired asset allocation.

Proactive Tax-Loss Harvesting

- Minimizes taxes through strategic sale of investments.

Access to Exclusive Investment Opportunities

- Provides curated investment options that align with family and business goals.



Estate Planning

4 hours/year

Efficient Wealth Transfer

Ensures smooth and tax-efficient transfer of assets to heirs.



Streamlines Estate Documentation

Retains and manages estate planning wishes and documents.



Minimizes Estate Taxes

Implements strategies to reduce estate taxes, preserving family wealth.



Tax Planning

10 hours/year



Year Round Tax Planning

Provides ongoing guidance to optimize tax situations.



Comprehensive Tax Strategy and Asset Allocation

Integrates tax planning into overall financial plan including tax efficient asset location strategies.



Coordination with Tax Professionals

Works with CPAs and tax advisors for holistic planning.

Retirement & Financial Planning

24 hours/year



Customized Retirement Plans

- Creates personalized plans based on family's goals and timeline.

Regular Plan Reviews

- Adjusts planning strategies as family circumstances change.

Minimizes Estate Taxes

- Ensures a steady income stream during retirement.

Risk Management

4 hours/year

Insurance Assessment

Reviews existing policies and recommends adjustments.



Asset Protection Strategies

Implements plans to safeguard assets against potential risks.

Education Planning

10 hours/year if needed



College Savings Plans

Establishes and manages 529 plans or other savings vehicles.



Scholarship and Grant Advice

Assists with identifying and applying for educational funding.



College Preapproval Process

Provides realistic estimates of what your family can afford.

Business Succession Planning

24 hours/year if needed

Succession Strategy Development

- Creates plans for the smooth transition of family-owned businesses.

Valuation and Sale Preparation

- Assists with business valuation and preparing for potential sale.

Coordination with Necessary Professionals

- Ensures legal, financial and personal aspects of succession are properly managed.



Cash Flow Management

8 hours/year

Budgeting Assistance

Helps create and maintain a family budget.



Expense Tracking

Monitors and reviews expenses to identify saving opportunities.



Debt Management

Advises on strategies to manage and reduce debt.





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PRAIRIE FIRE
W E A L T H  P L A N N I N G