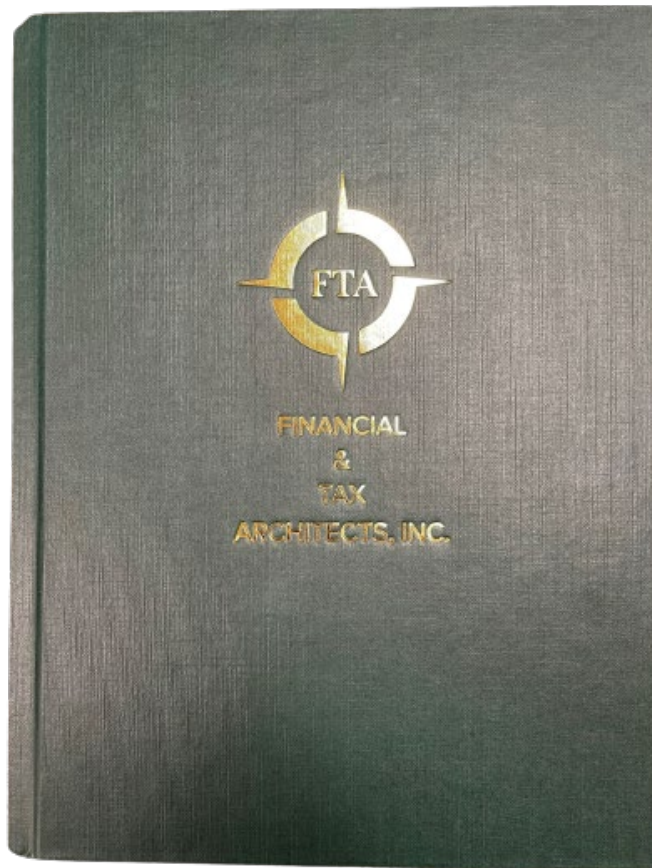
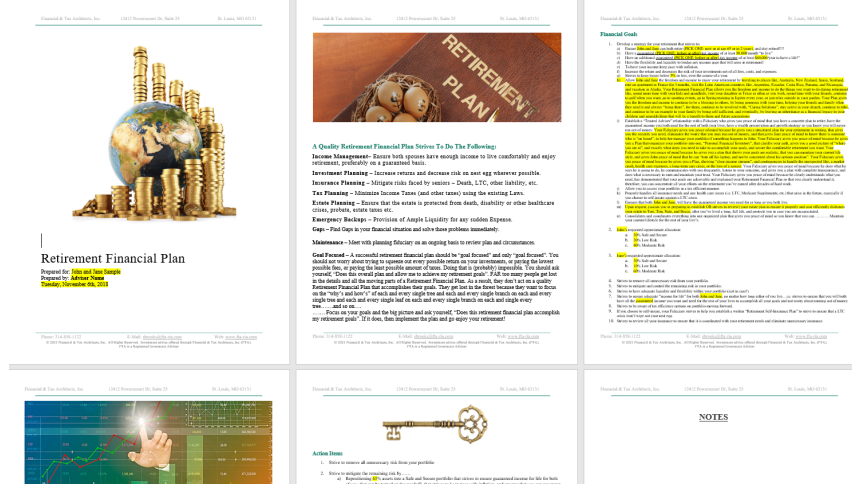


Preparing Written Retirement Financial Plan










1) Download the Written Retirement Financial Plan Template



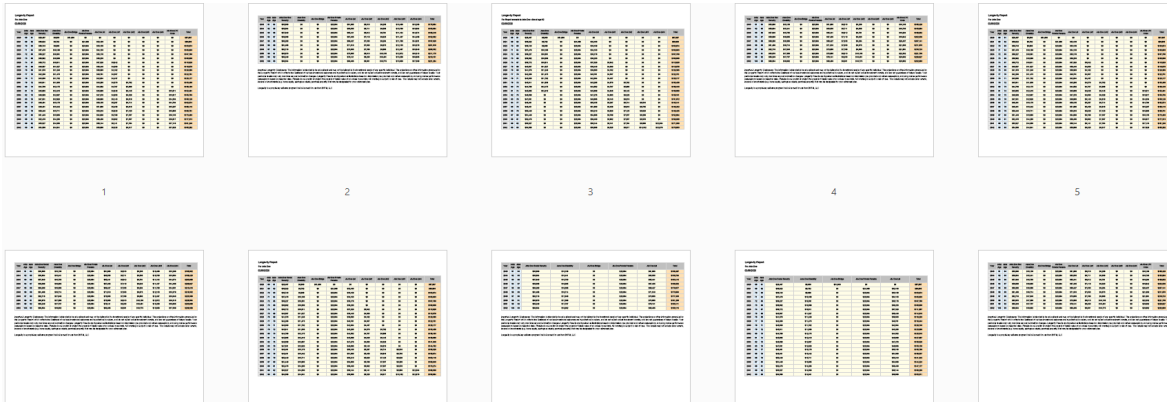
Plan Documents:

Located On BHFMM-fmo.com under 2nd Appointment Resources

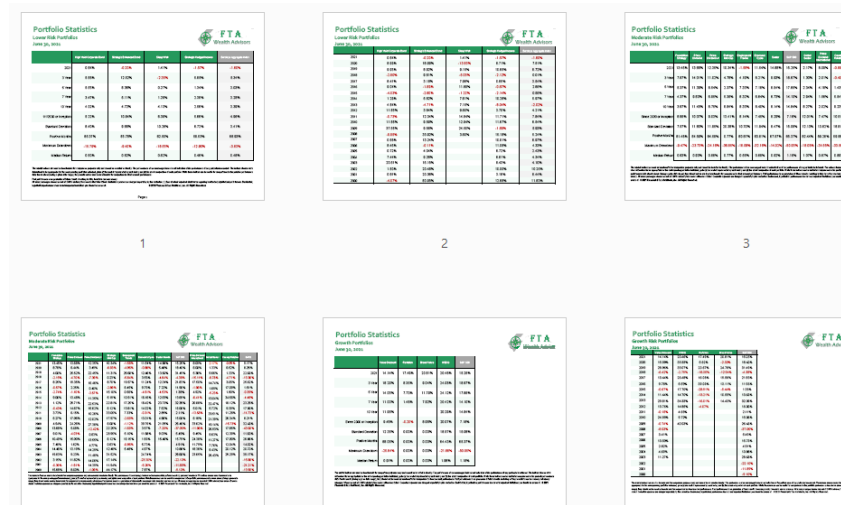
<https://www.bhfm-fmo.com/2nd-appointment/>

-  [ADV Part 3 \(CRS\)](#)
-  [Account Allocation Request Form](#)
-  [ADV Part 2A](#)
-  [Template - Written Retirement Financial Plan Couples](#)
-  [Template - Written Retirement Financial Plan Single](#)
-  [Portfolio Breakdown Template](#)
-  [Plan documents for AUM](#)

2) Next are the Longevity Income Reports Created at longevitysoftware.com










3) Add the 6 Pager (Remove the disclosure pages for a total of 6 pages.)



Located On BHF M-fmo.com
under FTA Wealth Advisor
Resources

<https://www.bhfm-fmo.com/FTAWealthAdvisors/>

-  NSDQ
-  PDJR
-  SGS
-  6 Pager
-  ADV
-  ADV Part 2B - Brooks
-  ADV Part 2B - Haave

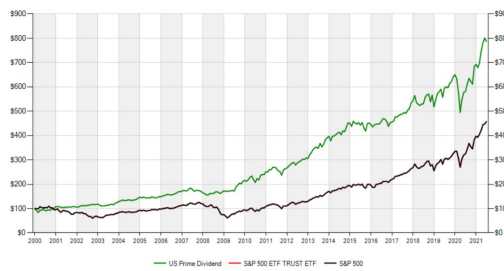
SPY : S&P 500 ETF TRUST ETF

\$443.78 Date Range From 01/01/2000 To 08/12/2021

Last Updated On : 08/11/2021



SPY : S&P 500 ETF TRUST ETF



4) Next are the risk graphs and investment reports which are created on Longevity

5) Lastly is ADV Part 2A, 2B, and Part 3(CRS.)

ADV FORM PART 2A DISCLOSURE BROCHURE

Financial & Tax Architects, Inc.

Office Address
11412 Pennsylvania Drive
Suite 20
Lanham, MD 21111
Tel: 314-859-1112

Website:
www.fta.com

March 3, 2020

The ADV Form 2A (the "Brochure") provides information about the qualifications and business practices of Financial & Tax Architects, Inc. ("FTA"). If you have any questions about the contents of this Brochure, please contact us at 314-859-1112. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

FTA is a registered investment advisor. Registration of an investment advisor does not imply any level of skill or expertise. The end and entire consideration of an investment advisor provides you with information about which you determine to hire or retain an investment advisor.

Additional information about FTA (2020-11-20-11:00) is also available on the SEC's website at www.adviserinfo.com.

ADV Part 3, Form CRS: Financial & Tax Architects, Inc.

Item 1. Introduction

Financial & Tax Architects, Inc. ("FTA") is registered with the Securities and Exchange Commission ("SEC") as an investment advisor. Brokerage and investment advisory services and fees differ and it is important for you to understand the differences. Free and simple tools are available to you to research firms and financial professionals at investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisors and investing.

Item 2. Relationships and Services

What investment services and advice can you provide me?

FTA offers investment advisory services to retail investors. Our advisory services consist of discretionary portfolio management and financial consulting. Portfolio management services are offered through a mix of proprietary investment strategies (called Private Wealth Strategies (the "Strategies"). A detailed description of each individual Strategy may be found in our ADV Part 2A, Item 4 or upon request. The description reflects the investment model each Strategy follows. All models are created before they are made available to retail investors. The model uses objective signals to determine which securities to purchase or sell and the timing of those trades. The Strategies are rebalanced not less frequently than monthly. Rebalancing is the mechanism used to ensure each Strategy is regularly updated. Depending on the Strategy, holdings may include a blend of both U.S. and International Exchange Traded Funds, Bond Funds, Individual Stocks, and U.S. Treasury securities. Unlike mutual funds or other common funds, retail investors own the underlying securities in their individual accounts. FTA does not charge a separate management fee for inclusion in a Strategy. Any specific investment restrictions requested by a client must be agreed to in writing. Imposing certain restrictions may impact the investment performance. For additional information, please see our Form ADV, Part 2A, Items 4 and 7.

FTA also provides retail investors with financial consulting services. FTA's financial consulting services are agreed upon in advance and are limited in scope. The aim is to address issues outside traditional portfolio management. Offering guidance on the investment options to select in an employer sponsored retirement plan is a prime example. Additional information is available in ADV Part 2A, Items 4 & 5.

Item 3. Fees, Costs, Conflicts and Standard of Conduct

What fees will I pay?

You will pay an advisory fee for our discretionary portfolio management services. FTA's standard advisory fee is 1.55%. Other fees you may pay include custodial fees to your account custodian, trading expenses and other management fees to ETF and mutual fund managers. Please see ADV Part 2A for additional fee information.

You will pay fees and costs regardless if you make or lose money on your investments. Fees will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. Consideration should be taken by your financial professional: help us understand how these fees and costs might affect my investments. If I give you \$50,000 to invest, how much will go to fees and costs, and how much will be invested for me?

What are your legal obligations to me when acting as my investment advisor? How else does your firm make money and what conflicts of interest do you have?

When acting as your investment advisor, we have a duty to act in your best interests and to not put our interests ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about those conflicts because they can affect the investment advice we provide you. Here are some examples to

Located On BHF M-
fmo.com under 2nd
Appointment Resources

<https://www.bhfm-fmo.com/2nd-appointment/>

Plan Documents:



ADV Part 3 (CRS)

Account Allocation Request Form



ADV Part 2A