

FinancialPoint®

For many families, planning their financial future is challenging...even under the best of circumstances. After a loved one dies, making important financial decisions on your own can seem even more daunting.

At this difficult time, Financial Counseling Services can help you understand your choices, develop a personal plan, make smart decisions, and give you peace of mind.

Financial Counseling Services is a free benefit offered by the Department of Veterans Affairs to beneficiaries of Servicemembers' Group Life Insurance and Veterans' Group Life Insurance plans.

Financial Counseling Services

A free service for
beneficiaries of
Servicemembers'
and Veterans' Group
Life Insurance



For information on other VA benefits call
1-800-827-1000

Financial Counseling Services... when you need it most.



Get Free, Objective Counseling

With this benefit, you get free financial counseling tailored to your needs from the national team at FinancialPoint®. Their Certified Financial Planners and other financial professionals are experts in handling a wide range of financial situations and offering customized assistance to individuals like you.

You can be assured the guidance you'll receive is objective and impartial. FinancialPoint counselors have no products to sell. They do not receive a commission for their services and they are not affiliated with any banks or investment firms.

Select the Plan You Need

Contact FinancialPoint by phone or email to request a Welcome Kit. You will find it contains valuable, easy-to-understand personal finance information. But most importantly, it has financial planning related questionnaires. The information you provide in these questionnaires is used to create your personalized financial plan.

You can choose to receive either a Comprehensive Financial Plan or one or more Specialized Financial Plans.

Comprehensive Financial Plan

Your plan may include information on:

- Estate Planning
- College Planning & Tuition
- Retirement Planning
- Medicaid & Long Term Care Planning
- Debt Reduction
- Social Security Projections
- Trust Planning

Specialized Financial Plans

Plans are available for these topics:

- Pre-Retirement
- Post-Retirement
- Wealth Building
- College Planning
- Estate Planning

Once you've completed the questionnaires, choose the most convenient way to return them to FinancialPoint—by email or U.S. mail.

Review Your Financial Plan

You'll receive a customized financial plan from FinancialPoint—generally five business days following their receipt of your completed questionnaires. Your plan will have specific suggestions, information, and resources for meeting short- and long-term financial goals.

Talk to a Financial Counselor... Whenever You Want

Call FinancialPoint to get answers to any questions you may have about your customized financial plan. Then, call as often as you want over the next 12 months to speak to a financial counselor.

Give Yourself Peace of Mind

Knowing and understanding your financial choices will help you make the right decisions and give you peace of mind.

CONTACT
FinancialPoint®

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