



OUR UNWAVERING COMMITMENT TO OUR CLIENTS IS TO LISTEN ATTENTIVELY,
UNDERSTAND THEIR NEEDS AND ALWAYS PLACE THEIR INTERESTS FIRST.



The Value of What We Do

We can help you plan your financial future and your legacy. We consider five critical areas of financial planning along with your family traditions, history, values, life lessons, and wishes.

Protection – evaluating whether your plan can withstand the unexpected.

- ❑ Review and analyze your financial position.
- ❑ Identify any risk exposures and recommend a variety of Risk Management solutions.
- ❑ Review, explain, and update your work and personal insurances so key risks are covered.
- ❑ Consult and develop strategies for Long-term Care – quality of life and asset protection.
- ❑ Assist you in implementing and regularly monitoring a comprehensive financial plan.

Estate Planning – seeing that your plan will carry out your wishes.

- ❑ Review and analyze your assets for proper ownership and beneficiary titling.
- ❑ Provide guidance to help you get your financial affairs in order.
- ❑ Consult and coordinate your plan with your attorney.
- ❑ Help to manage the financial impact of lifestyle changes (death, divorce, disability, health).

Retirement Income Planning – strategizing to determine if you'll have enough.

- ❑ Develop, refine, implement, and monitor a written retirement income plan.
- ❑ Provide guidance to determine if your retirement income and assets can last a lifetime.
- ❑ Determine how much to withdraw and where withdraw from for tax efficiency.
- ❑ Assist you in investment allocation decisions for your 401(k), 403(b), or other retirement plan.
- ❑ Outlining social security strategies that match your financial plan.

Taxes – maximizing what you earn by minimizing what you owe.

- ❑ Recommend tax strategies to minimize your taxes.
- ❑ Consult and coordinate your financial plan with your tax situation.
- ❑ Coordinating your business and personal taxes for greatest efficiency.
- ❑ Track cost basis for better planning and easier tax preparation.

Investments – aligning your needs and goals with the management of your portfolio.

- ❑ Establish how and how much to save.
- ❑ Advise on who should manage and how they should manage your money.
- ❑ Help you implement a time horizon investment strategy to reduce risk.
- ❑ Align your investment strategy with your financial plan, tax situation, and personal goals.
- ❑ Benchmark investment performance against your financial needs not the market.
- ❑ Provide you a disciplined approach to eliminate emotional decision making.

If you don't have a financial plan that addresses all these issues in the same comprehensive process, you are leaving parts of your financial future open to question. *Why risk that?* If you don't know where you stand, you should. If you want to know, we can show you how.

We provide conscientious wealth management services with a multi-family office approach that may help you live more confidently, enjoy more of your life, and further your family legacy. We provide you with cutting edge technology, so that your financial plan is updated on a daily basis and you have real time access to all of your financial information.

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