WHAT CAN WE DO FOR YOU?

Financial Planning & Investment Management

- Ongoing monitoring and advice
- Tax smart investing
- Risk profile and allocation

Coordination with Strategic Professionals

- Liaise the relationship between
- CPAs, Attorneys, banks, etc

Retirement Planning

- Required Minium Distributions
- Social Security Analysis
- Leaving to the next generation

Insurance & Annuity Products

- Life / Disability / Long Term Care Insurance
- Retirement income planning



Tax Return Analysis

- **Optimize income and reduce taxes**
 - **Roth conversions**
 - **Strategize deductions**

Charitable Giving

- **Donor Advised Funds**
- Gifting appreciated securities
- Qualified Charitable Distributions (QCDs)

Succession Planning

- Internal and external exit planning
- Pre-sale wealth forecasting

Estate Plan Review & Solutions

- **Estate plan analysis**
- **Estate tax funding analysis**
- **Estate tax reduction strategies**

