

WE HELP YOU MANAGE YOUR FOUR AREAS OF FINANCIAL OPPORTUNITY WHICH INCLUDE:

## WEALTH

Provide investment strategies including: Separately Managed Accounts, Mutual Funds, Variable & Fixed Annuities, and Alternative Programs. Utilize IRA's, TSA's, 401k's, Retirement Plan Rollovers, and College Savings Plans.

## ESTATE

Work with legal advisors to preserve legacy using Revocable Living Trusts, Charitable Remainder Trusts, Tax Exempt Entities, Limited Partnerships, and Limited Liability Companies.

## TAXES

Work with tax advisors to evaluate current strategy and structure. Utilize Tax Free, Tax Deduction, Tax Deferral, and Tax Credit programs to reduce and minimize tax.

## RISK

Minimize cost while transferring risk and safeguarding assets with Life, Disability, and Long Term Care insurance. Facilitate Buy-Sell Agreements and Business Valuations.

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