



Silvestri

FINANCIAL & TAX ADVISORS, INC.

Our team will partner with you, as an individual or small business, to address your entire financial portfolio. Through our experience, competence, and commitment, we work with you to develop and continually monitor the progress of our financial advisory recommendations to assess how they are performing towards achieving your financial goals.



SERVICES

INVESTMENT:

Creating an investment strategy that's designed to pursue individualized risk tolerance, time horizon, and goals.

ASSETMARK TRUST:

Provides secure recordkeeping services for clients' assets through trust and custodial services. Offers custom investments through a range of Investment Providers specializing in Core Market Exposure, Tactical, and Diversifying Strategies.

TAXES:

Utilizing our in-house Certified Public Accountant to incorporate tax efficient strategies and evaluate tax impacts from life changes.

INSURANCE:

Developing a well-structured insurance strategy to provide protection from the financial consequences of life's most unexpected events.

BUSINESS PLANNING:

Working with small business owners to develop a customized succession plan for the proceeds from the sale of a business to include appropriate tax planning strategies and recommendations for allocation of assets such as managed investment accounts as well as strategies for the tax efficient transfer of wealth and/or charitable giving.

Managing All Your Financial Service Needs Under One Roof

CORE MANAGEMENT

- Goals & Objectives Review
- Custom Analysis of Risk Tolerance
- Overall Net Worth Analysis
- Cash Flow & Budget Review
- Asset Allocation Review
- Investment & Portfolio Analysis
- Portfolio Performance Reporting
- Portfolio Rebalancing
- Annual Financial Advisory Review

TAILORED PLANNING

- Business Succession Planning
- Employer Retirement Plans and Services
- Retirement Needs Analysis
- Income Distribution Strategies
- Regular Investment Strategist Review
- Market/Economic Review
- Tax-Optimized Investing
- Strategic Tax Management
- Trust and Estate Planning Services
- Trust Creating and Asset Integration
- Strategic Planning for Wealth Conservation
- Charitable Gifting Strategies
- Access to Individually Managed Solutions*
 - Access to Portfolio Managers
 - Customized Solutions
- Comprehensive Insurance Planning
- Long-Term Care Analysis

*Subject to \$500K Investment Minimum