Longman WEALTHCARE MANAGEMENT, LLC

*"The New Standard in Tax Reduction & Retirement Planning Strategies"*

## Financial & Investment Planning "Watch Dog Service"

- Develop and implement a Financial Plan around YOU - sound, independent and objective advice
- Design and continuous monitoring of your business and personal investment portfolios
- Periodic meetings to review, evaluate and make changes in line with your financial goals & objectives
- Fees, NO commissions
- Formation and management of active retirement plans such as Cash Balance, Defined Benefit, 401k & Profit Sharing plans as well as retired individuals
- Divorces – uniquely qualified in financial affidavits, production requests, equitable distributions and QDRO's due to our close relationship in working with Actuaries

## Tax, Accounting & Consulting "Tax Reduction Planning"

- Accounting, Tax & Consulting under "One Roof" Easier to identify opportunities in maximizing tax reduction strategies
- Routine review of your tax situation to incorporate applicable tax law changes
- Collaboration with your external CPA regarding tax projections and tax ramifications
- IRS representation
- Consultations with Individual Actuaries and/or Third Party Administrators regarding the maintenance of your qualified pension plans

## Estate & Retirement Planning

- Preparation, implementation and monitoring of your Estate Plan, and Post-Mortem planning
- Business Valuation & Succession Planning
- Retirement Income planning in maintaining a comfortable standard of living and quality of life
- Retirement plan distribution strategy from employer plans, rollovers, inherited IRA's, etc.
- Family & Charitable gifting, Asset Protection and Wealth Transfer planning

## Elder Care & Concierge Planning

- Analysis for the elderly who want to remain at home, those living in retirement communities, assisted living facilities, nursing facilities and, any person, regardless of age with physical or mental disabilities
- Consultations with your elder care attorney, personal representatives and beneficiaries
- Care management, Crisis intervention, coordination with Home Health, bill paying & cash management
- Medicare, Medicaid and Social Security planning & monitoring

## Client Services & Communications

- Regular Newsletters and special reports to keep you apprised of the most current planning options including tax reduction taxes and retirement topics

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