

# ADVANCED PLANNING GROUP

Helping LPL Financial professionals implement sophisticated solutions to complex planning situations.

The Advanced Planning Group partners with LPL Financial Professionals to develop and implement strategies for affluent families and business owners looking to meet a variety of complex financial goals. With extensive advanced planning, tax and legal expertise, the team is able to work together with you and your clients to assist in complex planning cases. The team has knowledge and expertise in the following areas:

## Legacy Planning

- Asset and Income Maximization
- Wealth Transfer Planning
- Qualified "Stretch" Alternatives
- Irrevocable Trust Strategies
- Life Insurance Planning
- 3<sup>rd</sup> Party Premium Financing
- Estate Tax Mitigation Planning
- Gifting Strategies
- Special Needs Planning

## Charitable Planning

- Charitable Remainder Trusts
- Charitable Lead Trusts
- Private Foundations
- Donor-Advised Funds
- Qualified Charitable Distributions
- Charitable Gifts using Life Insurance

## Business Planning

- Buy/Sell Strategies
- Business Valuations
- Business Continuation Strategies
- Business Sale Tax Minimization
- Split Dollar Plans
- Insured Defined Benefit Plans
- Section 162 Bonus Arrangements
- Supplemental Retirement Plans

## Meet the Advanced Planning Group Team Members



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We are here to assist you with your complex planning cases.

Please complete our Complex Case Collaboration Form  
and send it to our team, or give us a call.