WE EMPOWER PEOPLE TO LIVE COMFORTABLE BY PLANNING WISELY.
OUR MISSION

Every person, family and business has a different set of priorities for what they want their money to accomplish. Whether it’s to save for retirement, put children through college, or simply leave a long, lasting legacy; our focus are your individualized goals.

We are a not a one-size fits all wealth management firm. Our team pride themselves on creating personal, goal oriented, and comprehensive strategies. We strive to equip our clients with the knowledge and confidence to make the best decisions for their family.

SINCERELY,
BUSH WEALTH MANAGEMENT
QUALIFICATIONS & PHILOSOPHY

Bush Wealth Management has been helping clients work towards their financial goals since 2004. We specialize in working with:

- Individual Investment
- Accounts Foundations
- Affluent Households
- Trust Accounts
- Endowments
- Retirement Plans

Our dynamic total wealth management approach is customized to address your unique financial needs and objectives. We follow a comprehensive process designed to determine the optimal approach to managing your assets.

**DISCOVERY:** Understanding your personal, professional and financial life goals

**EDUCATION:** Discuss the risk and reward characteristics of different asset classes and their contribution to the overall portfolio asset allocation

**RECOMMENDATIONS:** The optimal blend of options to meet your goals

**IMPLEMENTATION:** The strategy employed to construct your wealth plan

**MANAGEMENT:** Regular performance reviews and plan updates
“IN LIFE, THE PERSONAL RELATIONSHIPS FORGED BY TRUST ARE MORE COVETED THAN WEALTH ALONE; WE VALUE THOSE RELATIONSHIPS.”

BUSH WEALTH MANAGEMENT
COMPREHENSIVE FINANCIAL PLANNING
Focusing on a select group of clients allows us to offer you well-rounded, in-depth service. You can rely on us for all your financial needs, entrusting us to create comprehensive investment strategies for your assets.

Our comprehensive financial services and strategies:

• Asset allocation
• Risk assessment
• Tax consequences
• Portfolio management
• Insurance planning
• Business succession
• Education planning
• Retirement projections
• Account management
• Defined contribution plans
• Rollover strategies
• Roth IRA conversions
• Estate Planning
OUR PROCESS

Like we mentioned before, we are not a one-size fits all wealth management firm. We truly take the time to get to know you and understand what you want to accomplish.

Clients we serve the best possess the following qualities:

- They are financial delegates
- They enjoy simplicity
- They focus on what’s important
- They value our work together
- They appreciate honesty
- They are passionate about goals
MATERIALS TO REVIEW
PLEASE SEND OR BRING THE FOLLOWING ITEMS TO OUR OFFICE*

PERSONAL
• Most recent investment statements (401K, IRA, Roth IRA, etc...)
• Most recent Social Security benefits statement
• Life insurance policies
• Long-term care insurance policies or statements
• Annuity statements
• Most recent federal and state income tax returns
• Values of titled personal assets Last three months of bank and/or money market statements

BUSINESS
• Current profit and loss statement
• Buy-sell agreements
• Business insurance policies, statements and illustrations
• Retirement plan document

*Provide only materials that are applicable to your situation.
EXCEEDING EXPECTATIONS
At Bush Wealth Management, our clients are like family. We will guide you to make the appropriate decisions for your financial future so you can sit back and enjoy life with the ones you love.

Stacy Bush
President & Wealth Advisor

Courtney Gooding
Director of Client Services

Kent Patrick, CRPC
Wealth Advisor

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