



STONEBRIDGE
FINANCIAL
PARTNERS, LLC

Troy:
880 W. Long Lake Rd, Suite 550
Troy, MI 48098
T: 248.647.2400
F: 248-647-1643

Grand Rapids:
3258 Clear Vista Court NE, Suite 2
Grand Rapids, MI 49525
T: 616.808.3313
F: 616.808.3318

Financial Planning Services



Retirement Planning

Our team of financial planning professionals will design a plan that evaluates your current situation and provides you with a wide variety of investment options that align with your goals. We provide regular reviews and modifications, ensuring that your financial plan stays current and dynamic.



Estate & Family Planning

Your legacy is much more than your assets. It's your personal values, the memories that carry on and your entire belief system. Your estate plan should be a reflection of the legacy you want to leave.



Tax Planning

Financial planning and tax efficiency go hand-in-hand. Whether you're looking to properly save for retirement, help improve your income tax situation or want help with your business taxes – we can create a customized plan for you.



Education Savings

Your legacy is much more than your assets. It's your personal values, the memories that carry on and your entire belief system. Your estate plan should be a reflection of the legacy you want to leave.



Risk Management

Our team of Financial advisors continually monitor your portfolios and assess whether the risk profile remains aligned with the your goals. Stonebridge works diligently to safe guard your financial future with a fiduciary responsibility ultimately leading to more peace of mind.



Investment Management

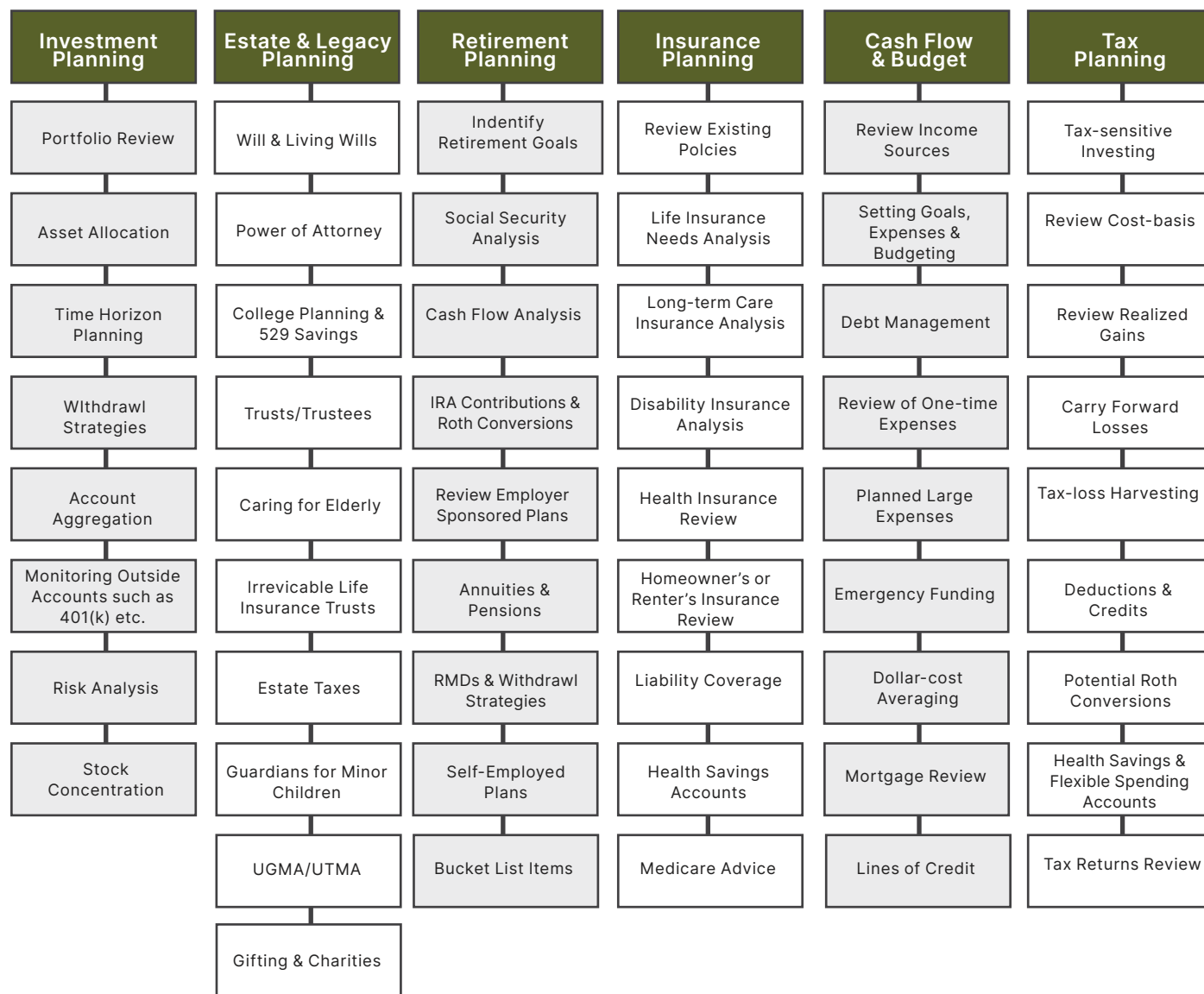
Money Doesn't Have to be Complicated. By leveraging a disciplined investment process, you receive transparency of information, seamless proactive service and the trust and accountability you need to pursue your financial objectives.



MORE COMPLETE LIST OF SERVICES ON BACK

For more in depth look at how Stonebridge can help you find your freedom please visit us at: www.stonebridgefinancialpartners.com

Our Services Continued...



In addition to our services listed above, we also:

- Coordinate with other advisors such as your attorneys and accountants.
- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.
- Coordinate family legacy meetings.