

THE RIGHT DIRECTION

Preparing to meet your financial goals

Our mission is to provide quality guidance, build relationships of trust, and develop innovative strategies for our clients.

We are perfectly positioned to meet your unique needs while striving to exceed your highest expectations.



► WHO WE ARE

Our mission is to provide quality guidance, build relationships of trust, and develop innovative strategies for our clients.

Capitol Financial Solutions is a full-service financial planning firm that specializes in working with business owners, entrepreneurs, and professionals. What this means is that we invest the time to better educate, organize, and prepare our clients for the inevitable financial issues they face. The real benefit is confidence in knowing you can protect and preserve your lifestyle, assets, and loved ones.

Our affiliation with **Osaic Wealth**, one of the nation's leading wealth management firms, provides us with comprehensive support including up-to-date industry information, service, and technology as we address your diverse needs. Osaic Wealth is one of the largest networks of independent wealth management firms in the United States.

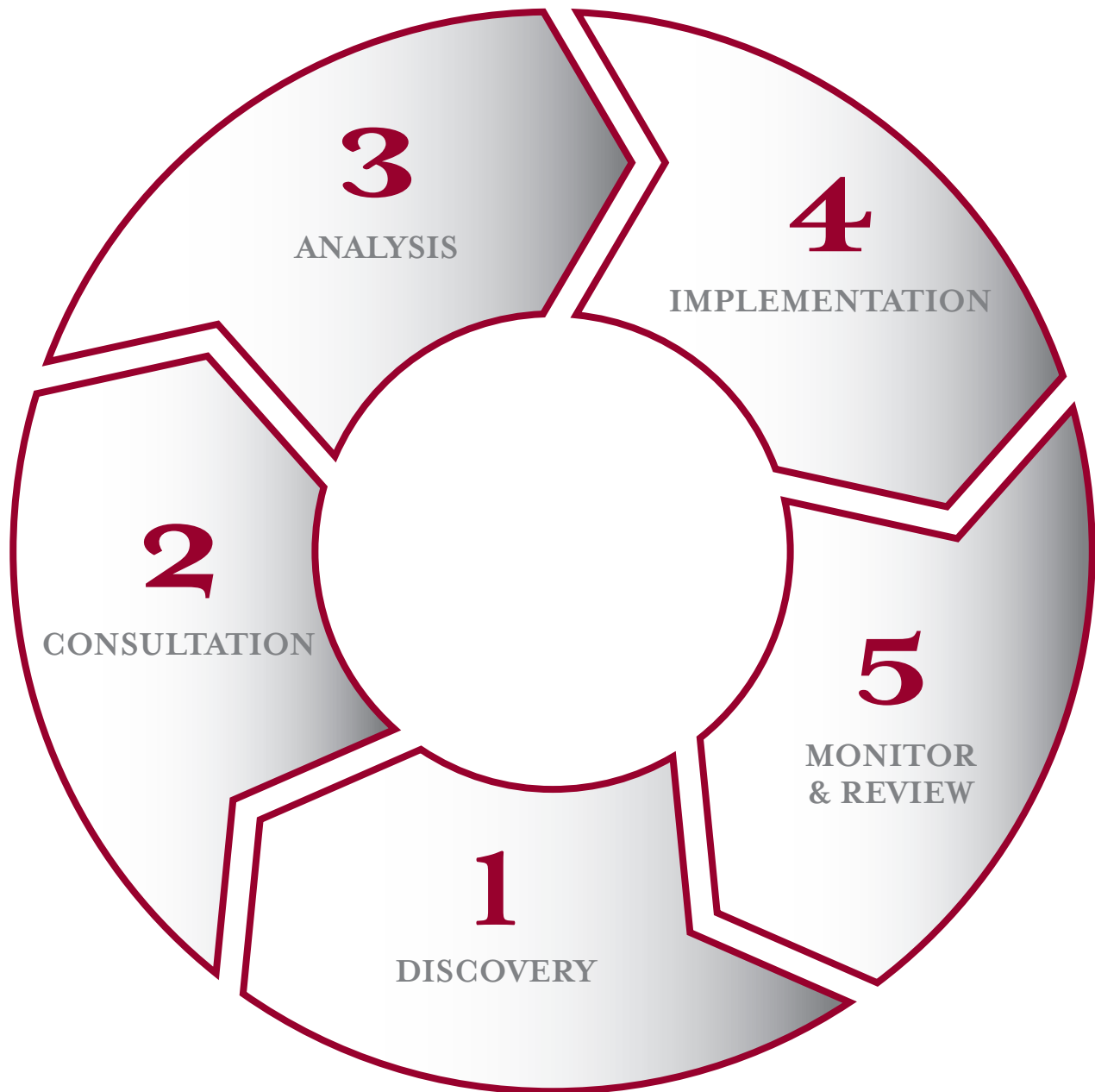
With our local presence, you can count on a client-first experience and the resources to help you achieve financial independence for you-and future generations.

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► YOUR JOURNEY IS AS UNIQUE AS YOUR FINANCIAL STRATEGY

Your needs and goals are unique to you – and your plan should reflect that distinction.



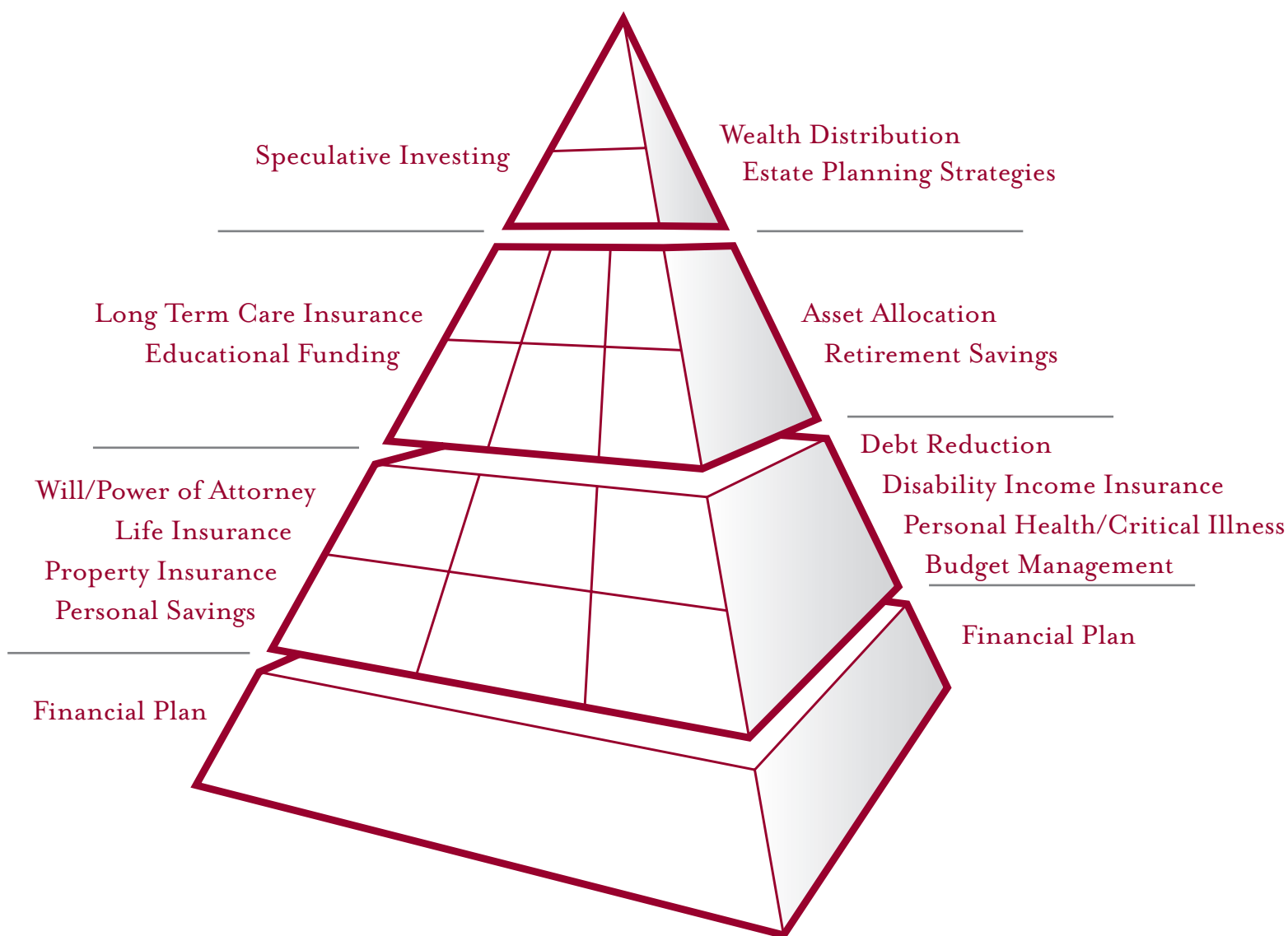
One of the ways we provide value to our clients is through our personalized 5-step process.

The financial analysis and recommendations are not intended to replace the need for independent tax, accounting, or legal review. Individuals are advised to seek counsel of such licensed professionals.

► LIVE LIFE THE WAY YOU WANT

With a proper financial strategy, you can meet goals for yourself and for those who matter most.

The Financial Planning Pyramid



The pyramid is a simple and effective way to prioritize your financial goals.



► COLLABORATION

A team of professionals means every resource, every option and every strategy is considered.

Capitol Financial Solutions prides itself on taking a comprehensive approach to customizing financial strategies to meet your needs. Our advisors encourage clients to integrate existing relationships with trustees, attorneys, accountants, and other professionals.

Wealth Management – taking advantage of your opportunities for growth while minimizing the impact of inflation, taxes, and market fluctuations

Financial Planning – providing you with a comprehensive evaluation of your current and future financial state

Retirement Planning – providing you with the tools and strategies to help you accomplish your retirement dreams

Charitable Planning – helping you support non-profits and charities

Comprised of a dedicated team of financial professionals and advisors with high core values and extensive experience in finance, law, insurance, and money management, our firm offers a wide range of products and services for:

Estate Planning Strategies – helping you preserve what you have worked hard to build and plan for tax advantaged distribution of your assets to heirs

Insurance and Risk Management – reviewing and implementing Life Insurance and Long-Term Care coverage to protect your estate

Educational Funding – positioning your resources to help achieve your goals for higher education

Special Needs Planning – financial planning for families and trustees of people with disabilities



► HELPING TO MAKE SURE YOUR HARD WORK PAYS OFF

Strategies for your business and the people who make it run

No two businesses are exactly alike, so our business strategies are tailored to your specific needs and include the following programs and services:

Employee benefit packages designed to enhance your efforts to attract and retain company employees and key contributors.

Retirement planning, offering qualified and non-qualified plans to help owners and employees build financial independence.

Executive compensation strategies that deliver the kind of benefits, compensation, and tax advantages that reward and motivate your key personnel.

Employee education, with sessions explaining retirement packages and seminars on a variety of financial topics.

Business continuation strategies to help ensure your business succeeds when you retire, or in the event of a premature death or disability.

Key Person Planning to maintain continuity during and after the loss of a key employee.

Qualified Retirement Plan Services, which can include selection, implementation and plan audit.

*You worked hard to get where you are today.
We will work hard to help you get where you want
to be tomorrow.*

ARE YOU READY TO GET STARTED?





www.capfs.com

Securities and investment advisory services offered through **Osaic Wealth, Inc.**, member FINRA/SIPC.

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