CAPITOL
Financial Solutions
Member of John Hancock Financial Network

"Our mission is to assist families and businesses in the accumulation and preservation of wealth."

WE FOCUS ON THE FOUR KEY AREAS OF FINANCIAL PLANNING:

WEALTH ACCUMULATION
Solutions to help you invest with confidence so you can achieve your short and long-term goals by taking into consideration your time horizon and risk tolerance.

Portfolio Building
Investment Advisory Programs
College Funding
Retirement Planning
Fee-Based Financial Planning

WEALTH DISTRIBUTION
Methods to help you manage your assets to your wishes, as well as minimize taxes, reduce administrative costs, and ensure effective management of your affairs when you are no longer able to.

Retirement Cash Flow Planning
Fee-Based Financial Advisory Services
Estate and Trust Planning
Charitable Gifting Strategies
Family Gifting Strategies

WEALTH PROTECTION
Strategies for protecting what you value most– your family, your hard earned assets, current income stream, future earnings, retirement savings, and your lifestyle.

Asset Protection
Survivor Needs Planning
Legacy Protection/Enhancement
Pension Income Alternatives
Life Insurance
Disability Income Insurance
Long Term Care Insurance

BUSINESS PLANNING STRATEGIES
Solutions that will maximize your personal benefits, provide the tools to recruit and retain key employees, protect against the loss of key employees, and create ownership succession strategies.

401(k) and other Retirement Plans
Executive Compensation Strategies
Employee Benefits
Key Person Insurance
Business Succession Plans

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