



“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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