

OUR CAPABILITIES



FINANCIAL PLANNING

- Critical Financial Events
- Stock Options Analysis
- Deferred Comp Analysis
- Education Planning
- Income Reporting
- Estate Planning
- Retirement
- Healthcare Planning

RETIREMENT PLANNING

- Goal Planning
- Balance Sheet Analysis
- Cash Flow Analysis
- Company Benefits Analysis
- Tax Analysis
- Risk Management & Insurance Planning
- Asset Management

BUSINESS SERVICES

- Retirement Plans: 401(k), Profit Sharing
- Pension, SEP, and Defined Benefit Plans
- Deferred Compensation Plans
- Executive Financial Services
- Stock Plan Services
- Key Person Insurance

RISK MANAGEMENT & INSURANCE PLANNING

- Business Insurance Planning
- Life Insurance Trust Strategies
- Long Term Care Insurance Strategies
- Disability Analysis
- Annuity Analysis

ASSET MANAGEMENT SERVICES

- Concentrated Stock Management Services
- Allocation Advisory
- Access to Top Professional Money Managers
- Common & Preferred Stocks, Bonds, Mutual Funds, Options, Structured Portfolios, Alternative Investments, and ETF Strategies

ESTATE PLANNING

- Estate Preservation Services
- Multi Generational Wealth Strategies
- Estate Tax Analysis
- Philanthropic Gifting for Tax Planning
- Whole Life Policy Strategies
- Term Insurance Strategies

FAMILY LAW PLANNING

- Create detailed pre and post divorce budgets
- Analyze various settlement options
- Develop creative options and financial planning strategies
- Provide attorneys with comprehensive reports and tools for settlement negotiations