



Henry B. Summer and Company
1508 Lindsay Street, Newberry, SC 29108
Phone: (803) 276-4246 Fax: (803) 276-9555

Menu of Services

Investment Management*

Individual stocks and bonds+
I-Shares and mutual funds
Variable and fixed annuities
Traditional and Roth IRAs
Simple and SEP IRAs
Single K plans
Brokerage Accounts
Company Plan Rollovers
Small Business Retirement Plans
Education Planning
Advisory Services
Government securities, T-Bills, and treasury notes+

Income Tax Services

Individual Tax Preparation
Corporate Income Tax Preparation
Estate and Gift Tax Preparation
Corporation, LLC, and Partnership Return Preparation
Trust and Gift Tax Return Preparation
IRS Audit Representation
IRS Correspondence and Response
Electronic Filing of both Individual and Corporate Tax Returns

Legal Services

Wills and Deeds
Durable Power of Attorney
Health Care Power of Attorney
Estate Planning
Probating Estates
Business Start Up Counsel
Corporation and LLC Formation
Legal Agreements

Accounting Services

Tax Reduction Strategies
Payroll Services including Payroll Deposits and Reporting
W2 and 1099 Preparation
Bookkeeping
Preparation of Financial Statements
Bank Reconciliation
Sales Tax Preparation

Insurance Services

Business Overhead Insurance
Life Insurance
Disability Insurance
Long Term Care Insurance

Financial Services

Cash Flow and Debt Management
Business Succession Planning
Gifting Planning
Retirement Planning

*Henry Summer+ and Buffy Glover+, Registered Representatives, *Securities offered through HD Vest Investment ServicesSM, Member: SIPC, Advisory services are offered through H.D. Vest Advisory ServicesSM, 6333 North State Highway 161, Fourth Floor, Irving, Texas 75038, (972) 870-6000.*

Henry Summer and Company is not a registered broker/dealer or independent investment advisory firm.