



COMPLIANCE

- Succession Planning
- Transition
- Mergers & Acquisitions



ADVISOR



| RIA | BD |
|-----------------------------|----------------------------|
| SFC Schwab TDA SEI | LPL Hybrid Corporate |

INFA

Goal

- SERVE
- Accumulate Assets
 - Protect Wealth



INTERNAL MONEY MANAGEMENT

- Portfolio
- Case Design

TRAINING & COACHING

- Increase Value
- Transition Overtime



PREMIER ADMIN PROGRAM

- Back Office Personnel



INSURANCE

- Life Insurance
- Disability Insurance
- Long Term Care



JOINT WORK

- With Leadership Team

