



FORESIGHT

financial partners

Our Services

Investment Planning Services

Our services include a complete analysis of your current financial portfolios in terms of your goals, appetite for risk and need for tax efficiency. We have access to multiple investment platforms and can design programs that are tailored to your current and future cash and income needs. We specialize in providing you with understandable reporting, tracking and access to your assets.

Family Wealth Planning

We work in concert with you and your other advisors to ensure that your estate planning reflects your goals and desires as well as help to minimize the impact of estate taxes and settlement costs. We can help you understand techniques and tools available to then implement a plan that will work for you and your loved ones.

Business Succession

Transferring of your business, be it to a family member(s), an employee or an unrelated party is a great way to continue your legacy and provide income and liquidity at your retirement. Properly designed agreements help to solidify expectations for all involved parties. We will work to create both agreements and funding necessary to complete successful transitions.

Retirement Planning

Together with our partners at Advanced Pension Designs LLC, we will use our expertise to design the most appropriate Retirement Plan for you -- individually or through your business. There are many types of plans and one size will not fit all situations. Secondly, situations change so your plan should be monitored to make sure they continue to work properly for you.

Retirement Distribution

Distributions strategies can increase your chances of enjoying a long retirement without fear of running out of money. The use of various assets such as retirement plans and government programs at the proper time and distribution rate, as well as lifestyle decisions will help you to mitigate risk and have confidence that your assets will last.

Fee Based Planning

We offer situational and comprehensive planning services. Our "Action Plans" provide a roadmap in implementing as well measuring the progress you are making with your personal and/or business plans.

Employee Benefits

Group Medical, Dental, Long Term Disability and Life Insurance are part of a continuing chaotic and ever changing landscape. We can help you to measure exposures and cost effectiveness of various carriers and programs while making sure that your programs meet the needs of your business.

Insurances and Risk Management Mitigation

Life, Disability and Long Term Care Insurance as well as annuities are financial tools which protect against the types of risks that can undermine even the best plans. Knowing where your plans are vulnerable is the first step in helping you determine how much risk you are willing to assume. Our Firm's independent model means that we can offer you the appropriate tool from the appropriate provider.

Executive Benefit Planning

Often we find that basic retirement planning and employee benefit plans are not able to compensate your highly paid executives commensurate with the value they provide. Properly designed programs allow you to exercise discretion as to whom you reward and at what levels.

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