

Teamwork divides the task and multiplies the success.

OneSource offers multiple professional services from one location in the areas of:

- Financial and Retirement Planning
- Accounting, Tax Counsel and Preparation
- Legal Services
- Insurance Protection

Have you had a life changing event? Are your assets properly protected? Do you have access to a team of advisors who communicate to address your needs?

The best results will come from coordinating with a Financial Advisor, Certified Public Accountant, Attorney and Insurance Professional.

Save time and frustration trying to coordinate these professionals on your own.

A OneSource coordinator is your connection to these experienced professionals. Using OneSource is convenient—you can reach our trusted, recommended advisors with one phone call.



Additional professionals available through OneSource:

- Commercial and Residential Real Estate Sales
- Marketing, Branding and Advertising
- Business/Personal Banking and Lending
- Technology and Communications Consulting
- Appraisers and Surveyors
- Contractors



143 South Main Street, First Floor
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LOCAL 262.247.8060

FAX 262.381.1231

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info@onesourceadvisorgroup.com



**Independent Advisors
Working as a Team for You.**

**Financial &
Retirement Planning**

Accounting & Taxes

Legal Services

Insurance Protection



Complimentary Review & Recommendations



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We offer complimentary review and recommendations of the following:

Financial & Retirement Planning

Life, Health, Disability and Long Term Care Policies, Annuity Contracts, Account Statements, Investments and Retirement Plans, Employee Benefits.

Accounting & Taxes

Three prior-year Personal and/or Business Tax Returns and Company Financial Statements.

Legal Services

Estate Plans, Accident Reports, Insurance Letters, Contracts, Complaints, Business Minute Books & Organizational Documents, as well as various Proposed Settlement Agreements, including Injury Claims, Employment Terminations, Divorce, and more.

Insurance Protection

Current Personal, Auto, Home and Business Insurance Policies.



OneSource Advisor Group provides a dedicated coordinator who will assist you step by step with each advisor during the planning process.