



Wealth Management Services

clarify vision for your future	balance work and life	create financial comfort	help and protect your family	build a legacy
plan for the future financial planning retirement income estate planning business succession	meet needs income planning expense/budgeting social security corporate benefits	simplify finances investment and savings home and assets automate aggregate	help children allowance and savings loans and gifting special needs learning about money	execute intentions wills and trusts power of attorney medical directives protect heirs
ease life's transitions marriage/divorce birth/death leaving my home career and profession	enhance lifestyle vacation home family trips and events hobbies and leisure lease versus buy	reduce taxes tax-loss harvesting asset location stock options strategies	assist parents long-term care eldercare counseling medical and housing	help beneficiaries designations special needs trusts and trustees valuation/projections
live my values clarify my mission give to community volunteer my time align investments	manage health medicare/supplemental long-term care care concierge wellness and nutrition	protect assets insurance liquidity business continuity corporate structure	fund education savings and investments pre-paid tuition student/parent loans grants/scholarships	give to charities planning strategies tax-advantaged gifts low-basis assets

Professional Team

Depending on your situation, aside from our team of CERTIFIED FINANCIAL PLANNERS™, the insights and expertise of the following professionals may be required:

<ul style="list-style-type: none"> • Actuary • Business Attorney • Certified Public Accountant (CPA) • Estate Attorney 	<ul style="list-style-type: none"> • Fiduciary • Geriatric Care Manager • Life, Health, and Disability Insurance Specialist • Property and Casualty Insurance Broker 	<ul style="list-style-type: none"> • Mortgage Broker • Philanthropic Consultant • Private Banker • Real Estate Broker
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