TOWERS
WEALTH MANAGEMENT

We value our client's needs above all else.

With TaxSmart forward thinking we capture life's financial concerns and help you make the most of your money while avoiding the most common financial pitfalls.

Addressing 8 most common financial issues and ensuring nothing is overlooked:

+Investment Management
Cash Flow and Debt Management
Family Risk Management
Retirement Planning
Education Planning
Estate Planning
Business Planning
Special Situations

WE LISTEN • WE ANALYZE • WE PLAN • WE IMPLEMENT • WE MONITOR & ADJUST

We will create tailored plans based on life goals, tax based financial opportunities and impartial investment solutions.

Towers Wealth Management does not provide legal advice. You should consult a legal professional regarding your individual situation.

TAXES

can be the costliest drag on investment returns, even greater than inflation, transaction costs or management fees.

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+Securities and advisory services offered through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Advisor. Tax preparation, accounting, bill pay, and payroll services offered by Towers Wealth Management, Inc. are separate and unrelated to Commonwealth.

17910 Cottonwood Drive, Suite B • Parker, CO 80134
Phone: 303-693-1234 • Fax: 303-693-8007
www.towerswmi.com

We provide the benefit of TaxSmart investment insight.

We believe the added ability to analyze your tax situation is critical before making investment recommendations.

It allows us to go the extra mile for every client.

As Financial Advisors and Enrolled Agents (EA) our background allows us a holistic view of your financial situation and the knowledge to uncover opportunities other financial advisors often miss. It allows us to provide a strategic perspective, to peek around corners, find hidden financial opportunities and vulnerabilities. This added value can help to provide maximum clarity.
We believe this high definition difference can help to maximize your financial goal.

TaxSmart investing might entail some or all of the following.

IRA & Roth IRA Strategies

Capital Gain/Loss Strategies

Bond Income Strategies

Dividend Income Strategies

Pension Distribution Strategies

Stock Option Strategies

529 College Savings Plans

Charitable Planning Strategies

Specialized Investment Strategies

Strategic Tax Alpha Strategies

Tactical Tax Strategies

1031 Real Property Exchange Strategies

HSA Contributions