



Hammortree Financial

creating peace of mind

The benefit

of our unique organization is the clarity, confidence, and comfort our clients feel knowing they have the financial resources that make a difference and stand the test of time.



Hammortree Financial Services

Strategic Alliances

ACCOUNTING INDIVIDUAL TAX & BUSINESS TAX RETURNS
LEGAL — WILLS & TRUSTS
PENSION ADMINISTRATION

www.HAMMORTREEFINANCIAL.COM

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Utilization of the Pinwheel “OUR PROCESS”

INTRODUCTION MEETING

DISCOVERY

- What's important to you
 - Concerns
 - Goals
- Gather documents

DESIGN

- Single topic or comprehensive

CASH FLOW

- Budgeting

ACCUMULATION

- Education
- Purchase a home
- Retirement

RISK MANAGEMENT

- Protecting your assets

INVESTMENTS

- Matching investments with goals
- Asset allocation

BUSINESS PLANNING

- Executive Benefits
- Employee benefits
- Business continuation
- Business succession

INCOME TAX

- Eliminate
- Reduce or defer

ESTATE PLANNING & WEALTH PRESERVATION

- Distribution
- Death Taxes

PRESENTATION

- Recommendations

IMPLEMENTATION

- No Procrastination

MONITOR & REVIEW

- Key to ongoing success

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