We'll help you address your financial situation with an integrated approach to managing your wealth. Whether your goal is wealth accumulation, preservation, or income generation, we're committed to delivering solutions that address your unique financial needs.

I'd like to	We can help you
Customize my investments	**Tailor portfolios to your unique situation**
Develop an overall plan for my finances	Consolidate your accounts and discover your needs through our process
Prepare for my next life stage: marriage, family, college savings, retirement	Develop a plan for each stage of your financial life
Invest according to my values	Align your investments with your personal beliefs
Reduce my tax burden	**Invest in strategies that use tax-reducing techniques**
Safeguard my excess cash ($250K+)	Expand your FDIC coverage up to $2.5 million
Increase my charitable giving	Establish a donor-advised fund
Strategies for concentrated stock positions	Work with a custom investment solution provider to develop a portfolio tailored to your needs
Generate more income	**Build a growth-oriented portfolio**
Preserve my wealth	Help identify the right preservation strategy
Plan for my legacy	Support your estate plan with trust and charitable giving tools
Improve my short-term cash flow	Access cash while keeping your portfolio intact
Integrate my checking account with investments	Open a bank account that's linked to your investments

We enjoy getting to know our clients, understanding your unique situation and needs, and developing a plan to help you get closer to your financial goals. If you have a change in your life, please let us know about it so we can plan for the support and financial resources you may need.

Wherever you are in your life, we can help you with everything from getting started saving to planning for your retirement income. Let us help you get started with an integrated plan for your financial life.

KURT WANNER

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Financial Planning offered through Crosswind Advisors, LLC, a Registered Investment Advisor and a separate entity from LPL Financial

Important Information:

This information is not a solicitation for investment and does not constitute investment advice. The opinions expressed are those of the financial advisor and are subject to change.

Investing involves risk, including the potential loss of principal. For more complete information about the various investment solutions available and the associated fees, please refer to the Disclosure Brochure, which you can obtain from your financial advisor.

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