YOUR NAVIGATION

For some, the unknown path of investments, retirement and taxes can be overwhelming and unclear. We can help guide you through the entire planning process to ensure a smoother ride. We collaborate with your CPA to connect tax planning, estate planning and wealth management to what is important to you.

DISCOVERY

- What is important to you?
- What planning have you done?
- What are your goals?

ANALYSIS

- Review current investments
- Understand tax situation
- Evaluate retirement progress
- Assets and liabilities
- Estate plan protection
- Review insurance planning

DEVELOP A PLAN

- Team approach with CPA
- Investment management
- Retirement income needs
- Understanding cash flow
- Risk mitigation

FOCUS ON THE TAX EFFICIENCIES

- In-depth review of taxes
- Collaborate with CPA to manage current tax liability
- Understand tax law changes
- Tax-efficient investment options
- Tax savings opportunities
- Strategies for business owners

RISK MANAGEMENT

- Life insurance
- Long-term care
- Disability income
- Personal property and liability
- Business continuation

ONGOING REVIEW/ SERVICE

- Review goals
- Has anything changed?
- Review next planning area
- Investment review. Are you on track?

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