THE SYTSMA GROUP
AN INDEPENDENT FIRM
RAYMOND JAMES

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Client

The Sytsma Group - Estate Coordination

Attorney

- Will
- Trust
- Durable Power of Attorney
- Durable Power of Attorney for Health Care
- Operating Agreement
- Buy-Sell Agreement
- Assignment of Membership Interest

Financial Advisor

- Investment Accounts
- Retirement Accounts
- Education Savings Accounts
- Charitable Accounts
- Family Foundations/LLC's
- Annuities
- Personal Insurance
- Funding of Buy-Sell Agreement
- Long Term Care Insurance
- Alternative Investments
- Multigenerational Transfers

CPA

- Tax Planning & Preparation
- Cashflow/Budget Analysis
- Mergers & Acquisitions
- Reviews & Compilations
- Business Valuation

Our Service will:

1) Organize your existing Estate & Financial documents

2) Assist you in defining your goals & priorities

3) Outline your estate planning gaps based on your goals & priorities

4) Provide action items to fulfill your wishes

5) Update your plan as circumstances change

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC