

# LEVEL OF SERVICE TAILORED TO OUR CLIENTS' NEEDS



## Investment Management

- Goals and Objectives
- Net-Worth Analysis
- Cash-Flow Analysis
- Asset Allocation
- Active Asset Management
- Loss Mitigation
- Portfolio Performance

## Financial Planning

- Retirement Planning
- Distribution & Tax Strategies
- Education Funding Strategies
- Survivor Needs
- Disability Coverage
- Insurance Planning/ Long-Term Care
- Estate Planning

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## Comprehensive Wealth Management

- Wealth Conservation
- Trust Integration
- Charitable Giving Tax Strategies
- Gifting
- Executive Compensation
  - Deferred Compensation
  - Stock Options
  - Concentrated Equity Positions
- Business Planning
- Debt Analysis

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