



## WHAT WE CAN DO FOR YOU

### CORE INVESTMENT MANAGEMENT

- Goals and Objectives
- Net-Worth Analysis
- Cash-Flow Analysis
- Asset Allocation
- Portfolio Performance

### FINANCIAL PLANNING

- Retirement Needs
  - Personal and corporate-
- Distribution Strategies
- Education Funding Strategies
- Survivor Needs
- Disability Coverage
- Long-Term Care
- Estate Planning

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- Goals and Objectives
  - Net-Worth Analysis
  - Cash-Flow Analysis
  - Asset Allocation
  - Newsletters and Market Insight
  - Portfolio Performance

### COMPREHENSIVE WEALTH MANAGEMENT

- Conservation of Wealth
- Gifting
- Trust Integration
- Charitable Giving Tax Strategies
- Executive Compensation
  - Deferred Compensation
  - Stock Options
  - Concentrated Equity Positions

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- Retirement Needs
    - Personal and corporate-
  - Distribution Strategies
  - Education Funding Strategies
  - Survivor Needs
  - Disability Coverage
  - Long-Term Care
  - Estate Planning

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- Goals and Objectives
  - Net-Worth Analysis
  - Cash-Flow Analysis
  - Asset Allocation
  - Portfolio Performance

425 N. Martingale Rd, Ste 760, Schaumburg, IL 60173    [turnbaughfleming.com](http://turnbaughfleming.com)    630-540-5016

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