

TFG

TURNBAUGH-FLEMING

GROUP OF

RAYMOND JAMES®

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

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

- Goals and Objectives
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