CoreWealth® | # HOW WE CAN SERVE YOU

PLAN

to help create financial confidence and peace of mind.

- Establish and review your personal goals and objectives
- Review your personal financial journey and your perspectives about money
- Cashflow review, analysis, and planning
- Education funding tools and strategies
- Retirement planning savings strategies
- Tax return review
- Employee benefits review and integration

INVEST

to help grow your wealth and income.

- Align your portfolio with your personal goals and objectives
- Determine asset allocation
- Portfolio selection and periodic strategy review
- Ongoing portfolio monitoring and rebalancing
- Tax mitigation strategies
- Ongoing investment education
- Investment Committee due diligence and ongoing performance & expense monitoring

PROTECT

your loved ones, your property, and your lifestyle.

- Life insurance analysis
- Health insurance and Health Savings Account review
- Disability insurance analysis
- Property and Casualty insurance review

IMPACT

the people and purposes most important to you.

- Estate plan review
- Wealth transfer strategies
- Charitable giving tools and strategies

ADDITIONAL OFFERINGS

SignatureWealth®
SelectWealth™
Company Retirement Plans
Endowments & Foundations

FOSTER® GROUP
Your Financial Life, Truly Cared For®