

# 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
- Special Needs and Elder Care planning
- Retirement planning, including Social Security optimization, and savings & withdrawal strategies
- Tax planning and tax return review
- Employee benefits review and integration
- Executive compensation review and analysis
- Closely held business planning
- Coordination with your other professional advisors



## 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
- Long-Term Care analysis
- Property and Casualty insurance review
- Medicare and Medicaid planning



## IMPACT

the people and purposes most important to you.

- Estate plan review
- Wealth transfer strategies
- Charitable giving tools and strategies
- Family education
- Caregiving succession planning

## ADDITIONAL OFFERINGS

CoreWealth  
SelectWealth

Company Retirement Plans  
Endowments & Foundations

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