Wealth Management Services

clarify vision for your future	balance work and life	create financial comfort	help and protect your family	build a legacy
plan for the future financial planning retirement income estate planning business succession	**meet needs** income planning expense/budgeting social security corporate benefits	**simplify finances** investment and savings home and assets automate aggregate	**help children** allowance and savings loans and gifting special needs learning about money	**execute intentions** wills and trusts power of attorney medical directives protect heirs
ease life's transitions marriage/divorce birth/death leaving my home career and profession	**enhance lifestyle** vacation home family trips and events hobbies and leisure lease versus buy	**reduce taxes** tax-loss harvesting asset location stock options strategies	**assist parents** long-term care eldercare counseling medical and housing	**help beneficiaries** designations special needs trusts and trustees valuation/projections
live my values clarify my mission give to community volunteer my time align investments	**manage health** medicare/supplemental long-term care care concierge wellness and nutrition	**protect assets** insurance liquidity business continuity corporate structure	**fund education** savings and investments pre-paid tuition student/parent loans grants/scholarships	**give to charities** planning strategies tax-advantaged gifts low-basis assets

Professional Team

Depending on your goals, needs and unique situation, the insights and expertise of the following professionals may be required:

- Actuary
- Business Attorney
- Certified Public Accountant (CPA)
- Estate Attorney
- Fiduciary
- Geriatric Care Manager
- Life, Health, and Disability Insurance Specialist
- Property and Casualty Insurance Broker
- Mortgage Broker
- Philanthropic Consultant
- Private Banker
- Real Estate Broker