

## Risk Management

- Life Insurance
- Medical Insurance
- Long Term Care
- Disability Income
- Asset Protection Strategies
- Evaluation & Review of Existing Policies

## Investments & Portfolio Management

- Investment Portfolio Management
- Investment Advisory Service
- Mutual Funds/Stocks Bonds/EFTs/Variable Annuities
- Tax-Efficient Investing
- Money Manager Analysis

## Business Problem-Solving

- Business Succession Strategies
- Employee Retention Programs
- Executive Compensation Strategies
- Stock Option Strategies
- Business Valuation and Transfer
- Integration of Personal & Business Planning for Owners

## Retirement Strategies and Estate Planning

- Retirement Income Strategies & Projections
- Qualified/Non-Qualified Retirement Strategies
- Pension Income Options
- 401k Rollover Strategies
- Annuity Income Strategies
- Estate Transfer
- Tax Reduction Strategies
- Charitable Giving

# Client Trusted Advisor

## Group Employee Benefits

- Health Insurance
- Dental/Vision
- Pre-Tax Benefits/Cafeteria Plans
- Voluntary Benefits
- Group Disability
- Group Life
- Group Long Term Care
- Group/Employee Seminars

## Business Strategies

- Business Valuation & Transfer
- Buy/Sell Agreements
- Transition & Continuation Strategies
- Coordination with Attorney/SPA for Analysis and Implementation

## Family Wealth Planning

- Estate Planning
- Full Service Trust Department
- Estate Transfer Techniques
- Philanthropic Strategies
- Family Foundations
- Integration of Values with Strategies

## Financial Planning

- Comprehensive Fee Based Financial Plans
- Specialized Planning Services
  - College Funding
  - Insurance Analysis
  - Annual Reviews

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