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Personal Financial Services

- Comprehensive financial review
- Retirement needs analysis
- Income distribution strategies
- Tax sensitivity strategies
- Estate planning strategies
- Education planning and funding
- Strategic planning for wealth conservation
- Investment management agreement
- Portfolio re-balancing and performance reporting
- Charitable gifting strategies
- Trust integration strategies
- Annual financial plan updates
- Overall net worth analysis

Business Financial Services

- Business financial strategies
- Group benefits management and evaluation
- Buy/sell agreement review and evaluation
- Complimentary business valuation and review
- Liability and P&C insurance review and cost comparison
- Key employee planning and retention strategies
- Executive compensation planning
- Comprehensive financial review
- Balance sheet review and analysis
- Tax sensitivity strategies
- Estate planning strategies
- Comprehensive insurance planning
- Overall networth analysis
- Cash flow and budget review
- Tax and cost basis reporting
- Tax efficient business transition strategies