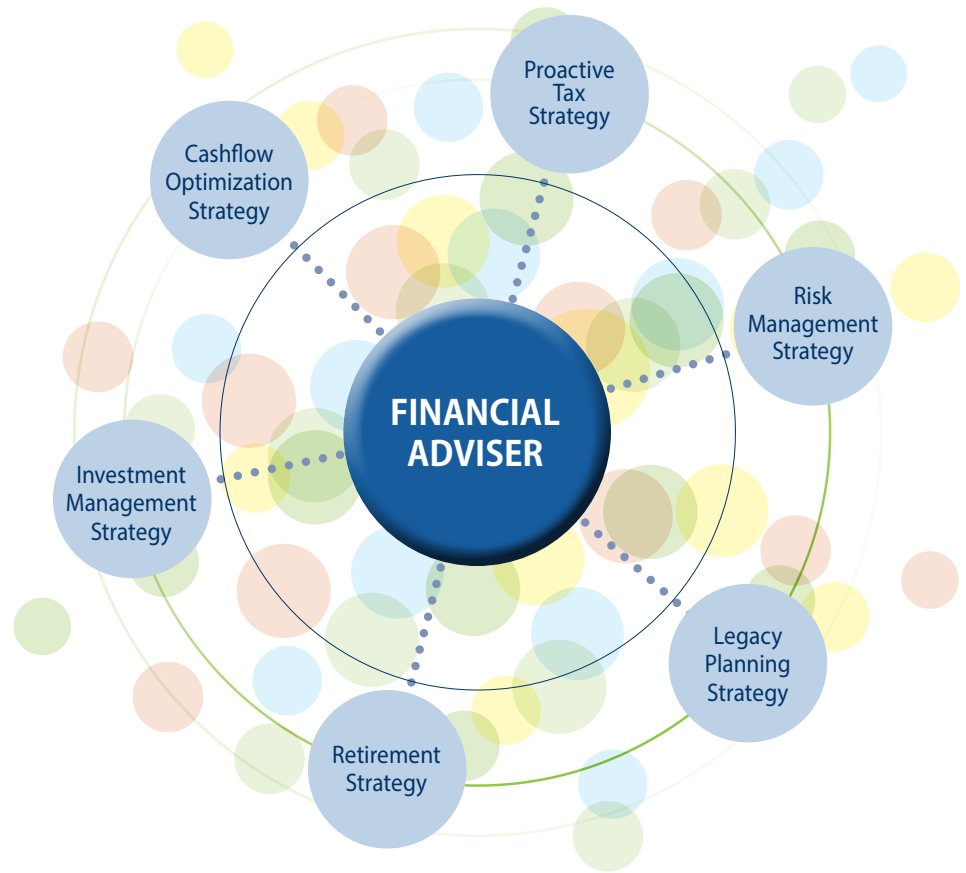


ABOUT US

The Business Consulting Team is a specialized planning team at Pacific Capital Resource Group, Inc. comprised of experienced financial advisers who focus on solving the advanced, financial needs of business owners.

Whether it's planning for one's retirement, transitioning ownership of the business, income tax mitigation, or the retention of valuable employees, our team will design a plan to accomplish the desired outcomes.

Our Mission is to engage business owners in a different type of conversation about creating financial strategies that benefit their unique situations.



CASH FLOW OPTIMIZATION

Saving can be cumbersome when income is inconsistent. Cash flow strategies will improve your control over your money to enhance liquidity and build wealth efficiently.

TAX REDUCTION STRATEGIES

Proactive strategies that will reduce the impact of taxation on your wealth and help high-income earners save efficiently.

RETIREMENT PLANNING

Build a plan towards financial independence so you can enjoy the most out of your wealth.

LEGACY PLANNING

Leave the most out of your estate to your family and charities, while reducing estate taxation & providing liquidity to pay for potential estate taxes.

RISK MANAGEMENT

Your income is your most valuable asset. Protect yourself and those depending on you with disability, life & long-term care insurance.

INVESTMENT MANAGEMENT

Investment strategies customized to your needs & goals with a fundamental, research-based, results-driven approach.

BUILD A PLAN

As a successful, busy, business owner, we can help you build a plan to build wealth & show you the financial strategies that allow you to enjoy the most out of your hard earned money.

LET'S GET STARTED!!

1. Comprehensive Financial Assessment
2. Plan Development
3. Plan Implementation
4. Regularly Scheduled Plan Review

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