

Estate & Business Planning Specialists

Innovative solutions, expert advice



COMMITMENT TO OUR CLIENTS

- Understand your business and your goals
- Address your needs by priority
- Coordinate with your other advisors
- Develop creative solutions that meet your goals
- Monitor and adjust your plan as needed

ESTATE & BUSINESS PLANNING SPECIALISTS INTEGRATED APPROACH

PERSONAL PLANNING

*Personal financial planning
Family protection
Retirement Income Planning*

ESTATE PLANNING

*Discounted giving
Trust planning
Charitable giving
Transfer tax planning*

BUSINESS PLANNING

*Business succession
Key person protection
Executive benefits
Retirement plans*

STAGES IN THE PLANNING PROCESS

The Estate and Business Planning Specialists are a group of experts in the estate and business planning area who focus on clients' priorities and objectives in their planning approach.

1. Discovery

Learn about your business, your personal financial objectives, and help clarify your goals.

2. Analysis

Evaluate the various options that would accomplish your business and estate planning goals.

3. Plan Design

Work with you and your other advisors to design a customized plan.

4. Plan Implementation

Coordinate estate and business planning strategies, review plan documents, and recommend appropriate solutions to complete the plan.

5. Review & Plan Service

Follow up to make certain your plan remains current and is updated as circumstances or objectives change.



Comprehensive and strategic approach for your estate planning and business planning needs

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STRATEGIC FOCUS

We bring unique problem solving skills, ideas, and expertise to help achieve your business planning or estate planning goals.

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