

# COMPREHENSIVE SUITE OF SERVICES

## Financial Planning

- Advanced Planning
- Business Financial Planning
- Corporate Benefits Review
- Charitable Giving
- Divorce Care
- Education Funding
- Elder Care Planning
- Healthcare Planning
- Multi-generational Planning
- Personal Financial Website
- Pension Valuation
- Social Security Maximization

## Risk Management

- Life Insurance
- Business Planning
- Disability Insurance
- Medicare Planning
- Long-Term Care Insurance
- Asset Protection Strategies
- Wealth Preservation Planning
- Estate Planning
- Asset-Based Long-Term Care

## Private Client Services

- Comprehensive Oversight
- Concierge Service
- Family & Entity Governance
- Family Philanthropy
- Foundation Planning
- Credit Structuring
- Custom Financing Solutions Advice
- Advisory Board Meeting Coordination
- Advanced Tax Planning Strategies

## Asset Management

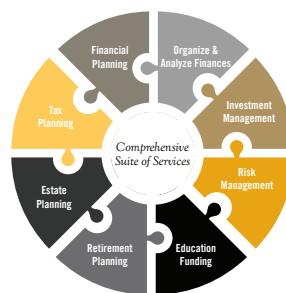
- Portfolio Analysis
- Portfolio Investment Strategy
- Volatility & Risk Assessment
- Asset Allocation Models
  - Capital Preservation
  - Income with Capital Preservation
  - Income with Moderate Growth
  - Growth with Income
  - Growth
  - Aggressive Growth
  - Defensive
  - Yield Plus
- Equity Separately Managed Accounts
  - Large Cap Growth
  - Large Cap Value
  - International
  - Dividend Growth
  - Small/Mid-Cap Growth
  - Completion
  - Cash/Funding
- Fixed Income Separately Managed Accounts
  - Taxable - Corporates
  - Tax Exempt Munis
    - Managed Muni Long
    - Managed Muni Intermediate
    - Managed Muni Short
    - High Yield Muni

## Corporate Retirement Plans

- 401(k)
- 403b/457
- Cash Balance
- ESOP
- Non-qualified Plans
- Profit Sharing
- Retirement Readiness
- Safe Harbor

## Business Services

- Financial Planning
- Cash Flow Analysis
- Key Employee Retention
- Tax Planning
- Insurance Review
- Contingency Planning
- Buy-Sell Agreement Design, Implementation, and Review
- Exit & Transition Planning
- Executive Benefits



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