



OUR APPROACH

We are dedicated to providing solutions to help build, manage, and preserve wealth for individuals and families with complex planning needs. With powerful tools and strategies, we are able to deliver an optimized plan customized for a client's unique circumstances and needs.

WHAT MAKES US DIFFERENT

Our team engages a client primarily as a consultant to provide detailed advice to their specific situation. Our advice does not require a product to be bought or assets to be transferred; it is provided on a fee-for-advice basis.

ADVANCED PLANNING SOLUTIONS INCLUDE:

Tax Planning

- Liquidity Event
- Tax Minimization Strategies
- Tax Diversification
- Tax Basis Planning
- Wealth Transfer Tax Planning

Estate Planning

- Estate Plan Design
- Trust Planning
- Asset Protection
- Charitable Planning
- Estate Modeling and Analysis

Life Insurance

- Large Life Insurance Policy Placement
- Premium Financing
- Split-Dollar
- Trust-Owned Policy Review
- Life Insurance Policy Management

ONGOING SUPPORT

After an introductory meeting for Advanced Planning services, there may be one or several meetings to dial in the optimal plan before finalizing. Typically, we will deliver a report on our analysis of the current scenario including suggested steps moving forward, provide guidance during implementation, and develop a meeting schedule for maintenance. (Certain strategies may dictate regularly scheduled meetings while other meetings are based on events.)

Examples of regularly scheduled meetings:

- Year-end tax planning
- Annual estate planning
- Life insurance policy reviews

Examples of meetings based on events:

- Business plan adjustments upon a merger or acquisition
- Meeting before a significant liquidity event
- Meeting upon significant changes in tax law