



Strategic
Financial
Solutions™

Our Services

At Strategic Financial Solutions, we don't believe in selling one-size-fits-all solutions. We pride ourselves on being unique because our processes are designed around results.

The Corporate Retirement Equation™

This is our multifaceted method for working to improve your corporate retirement plan. Our team assesses your current offerings and plan structure, then assists in the implementation of your complete communication, investment and service strategy. We leverage our substantial inventory of resources from the largest retirement and investment firms in the country to offer significant value per dollar spent.

The Integrated Equity Formula™

This is a series of steps designed to simplify the financial lives of individuals. Our team utilizes a suite of tools for comprehensive analysis. This analysis encompasses individual investment and retirement strategies, education planning and risk management. Our intentional review process also reviews your strategy through ongoing goal clarification and progress charting.

The 4Rs: Recruit, Retain, Reward, Retire™

This is our process for coordinating the design, administration, funding and implementation of Non-Qualified Executive Benefits programs. Our plans are designed to retire your key executives and often include an accumulation component that assists executives in developing a more secure retirement. This component also accounts for the additional constraints that executives experience inside qualified benefits or retirement plans.

The Portfolio Solution™

This is how we assist individuals, endowments and trusts in the growth and development of investment capital. Our method utilizes resources from a number of the largest and well-respected investment firms in the country, as well as objective and subjective analytical data, designed to stay ahead of the curve. We also provide proactive tax management strategies for your invested assets through ongoing discussions.

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