Our Services

Everybody wants to know how to retire and when to retire. Our team helps to champion your cause and specifically designs solutions to address the challenges standing between you and your goals.

These are the services we offer to fully leverage your investment assets:

Financial Planning and Investment Management Services

Baseline Financial Situation

- Goals and Objectives Review
- Custom Analysis of Risk Tolerance
- Statement of Service
- Asset Allocation Review
- Portfolio Rebalancing
- Portfolio Performance Reporting*
- Tax and Cost-Basis Reporting
- Basic Retirement Analysis

Additional Services:

- Financial Plan Development
- Financial Plan Updates
- Retirement Income Analysis
- Social Security Analysis

Moderately Complicated Financial Situation

- Comprehensive Financial Plan
- Business Balance Sheet Review and Analysis
- Comprehensive Retirement Needs Analysis
- Income Distribution Strategies
- Education Planning and Funding
- Income Tax Planning
- Comprehensive Insurance Review
- Estate Planning Review
- Consolidated Online Account Access
- Goals and Objectives Review
- Custom Analysis of Risk Tolerance
- Statement of Service
- Asset Allocation Review
- Portfolio Rebalancing
- Portfolio Performance Reporting*
- Tax and Cost-Basis Reporting
- Basic Retirement Analysis

Additional Services:

- Financial Plan Updates

Significantly Complicated Financial Situation

- Comprehensive Estate Planning for Wealth Conservation
- Charitable Gifting Strategies
- Executive Compensation Planning:
    - *Nonqualified Deferred Compensation*
    - *Stock Options*
    - *Concentrated Portfolios*
- Business Financial Planning
- Informal Business Valuation
- Succession Planning
- Annual Financial Plan Updates
- Comprehensive Financial Plan
- Business Balance Sheet Review and Analysis
- Comprehensive Retirement Needs Analysis
- Income Distribution Strategies
- Education Planning and Funding
- Comprehensive Insurance Review
- Consolidated Online Account Access**
- Goals and Objectives Review
- Custom Analysis of Risk Tolerance
- Statement of Service
- Asset Allocation Review
- Portfolio Rebalancing
- Portfolio Performance Reporting*
- Tax and Cost-Basis Reporting

Depending on the service, there may be fees, commissions or other costs. Please review applicable agreements for an explanation of services and costs.

*Reporting provided by Albridge, Morningstar and fund companies

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