FINANCIAL PLANNING OVERVIEW

It is our belief that investors goals are best achieved when their decisions are planned and designed with purpose. Our objective is to help our investors ask the right questions and partner with them to design a roadmap for their financial lives. As your partner and personal CFO, we proactively assist you in navigating life's financial complexities so that your future aligns with your goals.

Retirement Income and Cash Flow

Don't stop earning just because you stopped working. We can help design and implement a plan to carry out your desired lifestyle in retirement.

- Income Planning
- Social Security Maximization
- Retirement Readiness
- Personal Financial Roadmap

Investment Management and Asset Allocation

Make the most of what you've earned by tailoring a portfolio that is a direct extension of your financial strategy.

- Enhanced Income Strategies
- Custom Portfolios
- Concentrated Stock
- Options and Hedging
- Volatile Market Strategies

Tax Planning and Strategy

It's not what you make, it's what you keep. Our advanced tax strategies help you reduce your lifetime tax burden and increase your net worth.

- Tax Loss Harvesting
- Strategic Roth Conversion
- Tax Deferral Strategies
- Business Succession and divestiture

Asset Protection and Insurance

Risk comes in many forms. Through our risk analysis process we help clients understand their exposures, limit their liability and protect what is most dear to them.

- Medicare Planning
- Long Term Care
- Guaranteed Income
- Annuities
- Life insurance

Estate and Legacy Planning

Maximize control of your wealth by preserving and protecting your legacy for years to come.

- Next Generation Planning
- Asset Titling and Estate Structure
- Trust Planning
- Charitable Strategies

POWER WEALTH MANAGEMENT

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