

WHAT CAN BE GAINED FROM A MEETING WITH ME

Confidence and motivation to impact your life and financial goals

- Determine the important advantage of including an annual review process in your personal financial planning
- Plan for retirement
- Establish education fund for children
- Create an Estate plan
- Provide for charitable giving
- Making responsible choices now, for those left behind later

Save taxes / save money

- Create a tax-favored supplemental retirement plan
- Help maximize returns on your investments
- Create additional resources for non-taxable income

Insure your income from accident or sickness

- Protect assets (contingency planning)
- Analyze employer benefits and Social Security benefits
- Benefits of Disability Insurance, Long Term Care, and Life Insurance

Ensure the continuation of your business

- Business continuity in the event of disability, sale or death
- Plan for retirement
- Create additional equity for yourself with tax-favored executive benefits
- Retain key employees
- Coordinate company benefits and employee benefits

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