

## Fusing our expertise into your unique customized plan.

### CUSTOM FINANCIAL PLANNING

**Personalized planning solutions designed to move you towards your goals:**

- In-depth assessment by a dedicated wealth strategist
- Fusion with Tax, Legal & Estate Planning, and Family Governance plans
- On-demand scenario analysis to support ongoing decision making

**Expertise designing solutions for the ultra-high-net-worth:**

- Founders and CEOs
- Entrepreneurs
- Business Owners
- Wealth Creators
- Multigenerational Families

### ASSET PROTECTION PLANNING

**Beneficiary and ownership review**

**Fiduciary insurance assessment:**

- Income replacement
- Estate liquidity
- Liability and property

**Introduction to brokers specializing in ultra-high-net-worth needs:**

- Life & Disability
- Buy-sell planning and funding
- Property and casualty
- Health

### SPECIFIC STRATEGIES

**Advanced technology to monitor your progress**

**Breakthrough solutions based on discovery and success planning to help minimize dangers and maximize opportunities and strengths:**

- Quantified financial independence
- Tax minimization strategies
- Pre-sale and post-sale planning
- Cash flow planning
- Liability management
- Executive compensation and stock option planning
- Wealth transfer planning
- Succession and Estate Planning solutions
- Charitable planning

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