

# ADVANCED PLANNING

EXPERT LEVEL SERVICES THAT SERVE YOU AND YOUR VALUES



## TAX PLANNING

Know that every dollar your business has earned is being put to good use. Spot risks and leverage opportunities for lessening your income tax exposure, protect your employees, and create a secure savings fund.

◆ **Income Tax Exposure** ◆ **Business Security** ◆ **Retirement Uncertainty**

◆ **Tax Optimization Strategies** ◆ **Tax Return Appraisal** ◆ **Split-Funded Defined Benefits**

## GENERATIONAL WEALTH TRANSFER

With decades of consultative experience with wealth transfer issues, our Legacy Planning Department has a proven expertise in working through conversations on key financial issues and planning opportunities centered around efficiently passing on wealth.

◆ **Calculation of Value** ◆ **Estate Tax Liquidity** ◆ **Legacy Planning (Family & Business)** ◆ **Charitable Giving**

## BUSINESS VALUATION

Successful business owners dedicate thousands of hours towards building a successful company- & few would want to see that hard work crumble when they retire. Learn the true value of your business- then put that knowledge into action when strategizing the future of your company.

◆ **Estate Tax Liquidation** ◆ **Legacy Planning (Family & Business)** ◆ **Charitabel Planning**



ALIGNING WEALTH WITH PURPOSE

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## RETIREMENT

Take the uncertainty out of retirement planning with assistance from our accredited retirement planning experts.

- ◆ **IRA Contribution Planning**
  - ◆ **IRA Distribution Planning**
  - ◆ **Inherited Qualified & Non-Qualified Asset Planning**
- IRA & Roth IRA      Roth Conversions & RMD's      Strategic Legacy Planning

## EXIT STRATEGY PLANNING

You have dedicated thousands of hours towards building a successful company- & you certainly wouldn't want to see that hard work crumble when you retire. Our experts are here to make sure that doesn't happen.

- ◆ **Business Succession Planning**
- ◆ **Business Valuation**
- ◆ **Estate Equalization**

## EXECUTIVE BENEFITS

Our executive benefits experts can team up with you to design top-notch executive benefits strategies, from employee benefits plans to recruiting for replacements.

- ◆ **Key Person Insurance**
- ◆ **Employee Benefits**
- ◆ **Key Person Retention**

## LEVERAGE STRATEGIES

Leverage is a powerful tool that can potentially help you reach your financial goals.

Let us help you navigate.

- ◆ **Split-Funded Insurance Planning**
- ◆ **Split-Funded Qualified Plan Transfer**
- ◆ **Self-Financed Insurance Rapid Leverage Sequencing**

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