

7 Ways We Can Help in 2021



1



Helping Protect Investments from Painful Setbacks: Investments are protected from significant downturns so they'll be there when needed.

2



Tax Efficient Investing: We provide tax efficient investment programs to help minimize income taxes.

3



Provide Investment Counsel During important Life Events: divorce, turning the sale of a business into retirement income or loss of a spouse.

4



Private Placement Variable Annuity Solution: provides tax deferral on investment gains on unlimited contributions. Required minimum withdrawals do not begin until age 95.

5



Donor Advised Funds: We facilitate set up and manage investment accounts for charitable giving.

6



Custom Low Interest Rate Loan Access: Provide access and assistance with turning investment assets into a flexible, short-term, financing solution for needs such as purchasing a new home before selling the current one.

7



A Passion to Help: We work to help our clients have a financially comfortable retirement. And are happy to answer any questions at any time:

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