WEALTH STRATEGY & LIQUIDITY

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 Planing, and Family Governance plans
- On-demand scenario analyis to support ongoing decision making

Expertise designing solutions for the high-net worth:

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

ASSET PROTECTION PLANING

Beneficiary and ownership review.
Fiduciary insurance assessment:

- Income replacement
- Estate liquidity
- Liability and property

Introduction to brokers specializing in 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