



We'll help you address your financial situation with an integrated approach to managing your wealth. Whether your goal is wealth accumulation, preservation, or income generation, we're committed to delivering solutions that address your unique financial needs.

## I'd like to

### Customize my investments

Develop an overall plan for my finances

Prepare for my next life stage: marriage, family, college savings, retirement

Invest according to my values



### Reduce my tax burden

Safeguard my excess cash (\$250K+)

Increase my charitable giving

Strategies for concentrated stock positions



### Generate more income

Preserve my wealth

Plan for my legacy

Improve my short-term cash flow

Integrate my checking account with investments



## We can help you

### Tailor portfolios to your unique situation

Consolidate your accounts and discover your needs through our process

Develop a plan for each stage of your financial life

Align your investments with your personal beliefs

### Invest in strategies that use tax-reducing techniques

Expand your FDIC coverage up to \$2.5 million

Establish a donor-advised fund

Work with a custom investment solution provider to develop a portfolio tailored to your needs

### Build a growth-oriented portfolio

Help identify the right preservation strategy

Support your estate plan with trust and charitable giving tools

Access cash while keeping your portfolio intact

Open a bank account that's linked to your investments

We enjoy getting to know our clients, understanding your unique situation and needs, and developing a plan to help you get closer to your financial goals. If you have a change in your life, please let us know about it so we can plan for the support and financial resources you may need.

Wherever you are in your life, we can help you with everything from getting started saving to planning for your retirement income. Let us help you get started with an integrated plan for your financial life.



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**Important Information:**

This information is not a solicitation for investment and does not constitute investment advice. The opinions expressed are those of the financial advisor and are subject to change.

Investing involves risk, including the potential loss of principal. For more complete information about the various investment solutions available and the associated fees, please refer to the Disclosure Brochure, which you can obtain from your financial advisor.

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