

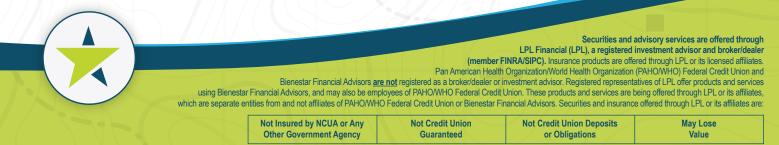
THE VALUE OF FINANCIAL PLANNING

MY MISSION: To help individuals and families pursue their financial goals by making prudent and tax-efficient financial decisions and minimizing costly money mistakes.

¥==	AREAS OF EXPERTISE	 Asset management Retirement planning Distribution planning Tax planning Debt management Goals-based saving Insurance assessment 	 Partnering with other financial professionals Risk management Cash-flow planning Estate planning Charitable giving Business financial planning
	CHARACTERISTICS OF PEOPLE WE HELP	 Serious about achieving personal financial success Goal oriented Open minded 	 Like to leverage other people's expertise Desire a structured planning process
	CLIENTS WHO MIGHT BENEFIT FROM OUR HELP	 Individuals planning for and nearing retirement People faced with a major financial decision due to divorce, retirement, death, or inheritance Business owners who need to find ways to diversify beyond their business ownership 	 Business owners exploring ways to exit their business and unlock their wealth Individuals who are seeking assistance with financial planning

We work with a wide variety of clients who find meaningful value in the planning we can provide. My goal is to expand the positive impact we have and help more people in our community. Would you be willing to introduce me to a few people who could benefit from my services?

I'd be happy to have an initial conversation with them to see if it would be of mutual benefit.



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