How do you present the *full* value of your practice?

Implementation
- Clear Wealth Plans
- Consistent Follow-through of Plans
- Seek Out Opportunities to Increase Value Wealth

Remarkable Difference
- Independent Advice — Partnered with Secure Broker-Dealer; Objective Advice
- Education — Client Seminars & Learning; Online Calculators and White Papers
- Education Saving Strategy
- Cost-Efficiency — Management Oriented, Not Transaction Oriented; No Conflicts of Interest; Transparent Fee Structure; Low Sales Charge Available
- ++ Years Experience — Business Owner Community; Specialized Service; Families and Private Wealth
- Scalability — Uniform Results; Reliable Investment Growth
- One-to-one Client Process

Core Philosophy
- Specialist Attention to the Business / Financial Side
- Monetize Your Work
- Integrate Personal and Professional Goals
- Use Your Business to Reduce Tax
- Consistent Investment Growth
- Plan for an Early Retirement
- Plan for Family Health Issues
- Liability Protection
- Liability Review

Network of Specialists
- Private Banking — Exclusive Wealth Strategies
- Taxation and Accounting — Mitigation and Review
- Investment Managers — Cross Section of Best Performing
- Insurance Specialists
- Business Succession Planners
- Private Trust Officers
- Cross-Border Specialists
- Legal Specialists
- Estate Planners
- High Net Worth Planners
- Risk Management Specialists

Resources
- Asset Managers — Over 5000 Worldwide
- Insurance Companies — Access to All National Insurance Companies
- Bank Resources — Distribute from Any Bank in the Country, Assets from Any Bank in the Country
- Product Providers
- Research and Analysis
- Professional Tax Guidance
- Storage of Financial Documents — Important Documents Saved Electronically
- Updated Balance Sheet

Service Expertise

Pension Rules
- 401(k) Rollover
- Pension Commuting
- Tax Deferral Options

Tax
- Defer
- Minimize
- Corp Class
- T-Series
- Charitable Strategies
- Tax-Sheltered Investing
- Income Splitting
- Insurance Review and Coordination Income

Estate
- POA
- Healthcare Directive
- Trusts
- Will Review
- Bypass Estate Options
- Tax In Estate
- Buy / Sell
- Family Cottage
- Assist Executors & Beneficiaries
- Natural Disaster plan
- Will / Living Trust Status
- Estate Plan
- Estate Tax Planning

Retirement Planning
- Strategies for Early Retirement
- Business Valuation
- Spending vs. Saving
- Plan for Time with Loved ones
- Long Term Care Plan
- Dependent Suport Plan
- Pro and Fiduciary Protection
- Identity Theft Protection
- Emergency Fund Status
- Retirement Accounts Adequacy
- Guaranteed Income Strategy
- Charitable Giving Plan

Investing
- Asset Allocation
- Investing within Your Business
- Risk Management
- Disciplined Strategy
- Capital Gurantees
- Annuity — Single Joint or Corporate; Lifetime vs. Term; Prescribed; Variable
- 401(k)
- Cash
- Roth IRA
- 529 Plan
- Asset Consolidation
- Financial Analysis
- Investment Consulting
- Due Diligence
- Oversight

Deduction Maximizations; Contribution Limits; Personal vs. Spousal; Withdrawal Strategies

Interest on Savings; Regular Income to Bank

Time Frame Evaluation; Contribution Limits

Avoiding Tax Penalties; Withdrawal Strategy

Wealth Management
- Integrate Objectives
- Cash Flow Management
- Asset Management
- Cash Management and Banking
- Philanthropic and Legacy Planning Risk Management

Insurance
- Analyze Needs
- Policy Type
- Structure
- Funding Strategies
- Major Purchase Funding
- Personal Interests Funding
- Life Insurance Status
- Disability Insurance Status
- Health Insurance Status
- Personal Health and Wellness Plan

Business Consulting
- Succession Planning
- Business Value Maximization
- Budget Review Cycle
- Work Break Plan

Business Structure
- Hold co. & Op co.
- Professional Corporation
- Sole Proprietorship
- Cash Flow

ADVISORBRANDING™
STRATEGIES TO SUCCEED

This diagram illustrates the complete service offerings and resources through which you can leverage the value that you provide. It's an effective way to introduce a client to the depth of your service, and you are free to use it as your own. However, it also shows the vast potential you have to make your practice irreplaceable. Our service is to help you do just that.

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