ARE YOU LEVERAGING BUSINESS OPPORTUNITIES TO HELP ADDRESS YOUR PERSONAL FINANCIAL GOALS?

THE BUSINESS OWNER MODEL™

Live your life with confidence.



THE BUSINESS OWNER MODEL™

A plan that creates solutions for your organization A logical process to help you make informed decisions

What makes us different? Our comprehensive process provides strategies to help your family resolve conflicts, reduce taxes and transfer your business to the next generation. We help you evaluate your current situation and develop a logical process so you can make informed decisions about your financial future.

CONTINGENCY PLANNING

You have a responsibility to plan for the worst case scenario in order to protect yourself, your family and your business. We can help keep you informed about your options so you can make the most educated decisions.

EMPLOYEE BENEFITS

In today's competitive environment, retaining key employees is vital. An appropriate benefit plan can improve morale and impact your bottom line.

SUCCESSION PLANNING

You oversee everything from employee benefits to cash flow, leaving little time to analyze, let alone prepare, for the eventual transfer or sale of your business. Ultimately, you'll want to enjoy the comfortable retirement you deserve.

THE BUSINESS OWNER MODEL™

Do you have a plan?

RETIREMENT PLANNING

A comprehensive retirement plan can serve as a road map so you'll know if your income needs have the potential to be maintained indefinitely. Plus you'll need to know if your money is in the appropriate places and which assets should be used first.

FINANCIAL PLANNING

Your business is likely your single largest asset. Strategies put in place now can help you leverage your business entity so you can work toward your financial goals. A well-designed and properly executed plan can help keep you on the right track.

WEALTH TRANSFER

Taxes can significantly shrink the size of your estate. Careful planning is needed to help resolve complex issues, help your business' chances for survival, minimize estate taxes and provide for your family in a fair and equitable way.

Phone: 502-244-4150

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