WEALTH PLANNING FOR ENTREPRENEURS

Entrepreneurs are so busy running their businesses, they often forget to plan for their own financial future, including the ultimate disposition/transfer of their business interests. The reality is that for most business owners, personal wealth is linked closely with the fortunes of their businesses.

WE'LL HELP IDENTIFY FINANCIAL GOALS

We'll take a comprehensive look at your personal and business needs to help you reach your goals.

PERSONAL FINANCIAL PLANNING

The need for a personal financial plan that evolves with you is as important as having a strategic plan for your business.

We offer the following wealth management services:

- Comprehensive financial planning
- Lifetime financial projections
- Retirement planning
- Investment portfolio diversification
- Strategies to help you grow investable assets while you grow your business
- Tax-efficient trust and estate planning
- Savings strategies
- Charitable giving planning, including the creation of a private foundation or donor advised fund
- Low-basis stock planning
- Strategies required before and after a major liquidity event, e.g., the sale of your business

FINANCIAL PLANNING FOR YOUR BUSINESS

We'll assist you with year-round strategic planning for your business.

We offer the following specialized business services:

- Business growth strategies
- Pro forma profitability analysis
- Risk management, including insurance assessment and planning
- Business succession planning
- Executive compensation planning
- A diversified investment portfolio for your business
- Business entity selection
- Direct, private investments

WE'LL COLLABORATE WITH YOU

We'll collaborate with you to provide you with personal wealth management and business strategies designed to complement one another.