FAMILY WEALTH
SOLUTIONS
Powered by CONCURRENT

Our Services

Our services bring expertise in all aspects of wealth management. We take a holistic approach, ensuring that every aspect of your financial life is well-managed and planned for.

Financial Planning

- Income Analysis – Cash Flow/Budgeting
- Investment Planning
- Education Funding Analysis
- Retirement Planning
- Debt Management Review
- Life Insurance Review/Needs Analysis
- Disability Insurance Review/Needs Analysis
- Long-Term Care Insurance Review/Needs Analysis
- Estate Planning
- Charitable Giving Strategy Review
- Tax Planning
- Corporate Executive Services
- Stock Option Planning

Employee Benefit Analysis

- Business Owner Services
- Business Succession Planning

Investment Consulting Services

- Ongoing investment advice on assets
- Monitor and review existing investment portfolio and provide investment recommendations consistent with your investment objective and risk profile

Family Office Services (for select clients who qualify)

Alternative Investment Opportunities (For select clients who qualify)

- Private Equity
- Real Estate
- Lending
- Etc.

Additional Areas of Focus

- Restricted Stock Analysis
- Key Man Insurance Review
- Non-Qualified Plan(s) Deferred Compensation Review
- Business Succession & Monetization (Managing Private Company Wealth)
- Wealth Fortification (Creditor Protection)
- Tax Allocation
- Philanthropic Planning
- Investment & Tactical Asset Management
- Legal Document Review (Wills and Trusts)

FAMILY WEALTH SOLUTIONS

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