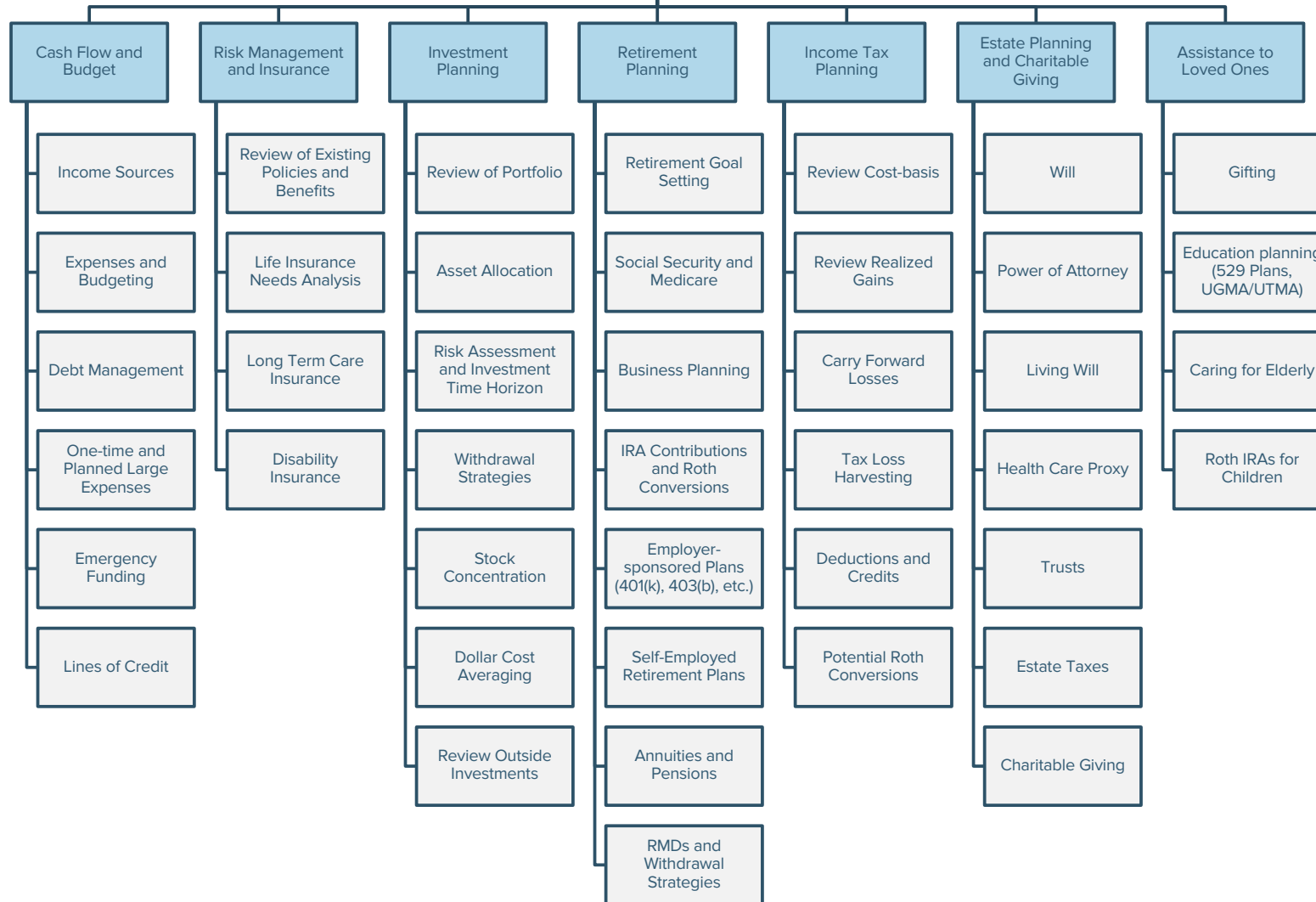


What does your Financial Advisor Do?

Areas of Financial Planning



Concierge Services

- Coordinate with other professionals such as attorneys and accountants.
- Hold regular meetings and ensure that all planning is well coordinated and implemented.
- Maintain copies of documents such as insurance policies, estate planning and legal documents and tax returns.