

## Financial Strategies – Wealth Management Group coordinates with the Best-In-Class Professionals, for you

### Wealth Transfer Management

If you have had any changes in your life recently – death, births and more – it's time to see our expert update your legal documents. Make sure your will, trusts, powers of attorney and legal documents are current. Make sure your children and grandchildren, or charity, inherit according to your wishes.

### Tax Management

There is no escaping taxes. All of us are concerned about how to protect our assets from increasing tax rates. Let our expert review your taxes and ensure you pay your fair share, and no more.

### Mortgage Management

Do you have the best mortgage for your needs? Do you have questions about getting a shorter- or longer-term mortgage, lower interest rate, reverse mortgage or vacation property mortgage? Nobody knows mortgages like our expert.



### Risk Management Property & Casualty

Our expert will make sure you are not over- or under-insured (especially in today's litigious society). Don't pay for more than you need, but make sure you have what you need.

### Portfolio Management



### FINANCIAL STRATEGIES

We help you make smart choices about your money so you can accomplish your goals for the reasons that are important to you. We specialize in comprehensive portfolio management – S.T.A.R.S.™, guaranteed income, existing and new account management, tax management and more. We are your Chief Financial Officer for the Best-In-Class and for life.

### Risk Management Life & Health

Good health is not guaranteed, so make sure you are covered for those unexpected, but inevitable events. Our partner is an expert in **life, health** and **long-term care** to ensure you have the right coverage to protect you and your estate.