



Wealth Management

The “What If” Workshop

May 4, 2010

Foundations of Wealth Management

Wealth management is the integration of financial solutions and advisory services to assist affluent clients, their families and their businesses with the accumulation, preservation and transfer of wealth throughout the various stages of life.

Today's complex and ever-changing financial world makes the need for comprehensive, professional advice even more compelling. To help you reach your goals, we provide the foundation and a personal financial plan.

Financial Fitness

We are your Financial Fitness experts.

- *Retirement Income Planning*
- *Portfolio Construction*
- *Budgeting*
- *Insurance Reviews (Life, Long-Term Care, Disability)*
- *Estate Planning*
- *College Planning*
- *Financial Organization*

How can we help you?

- *Employee Education*
- *Panel Discussions*
- *Individual Consultations*

My What If's



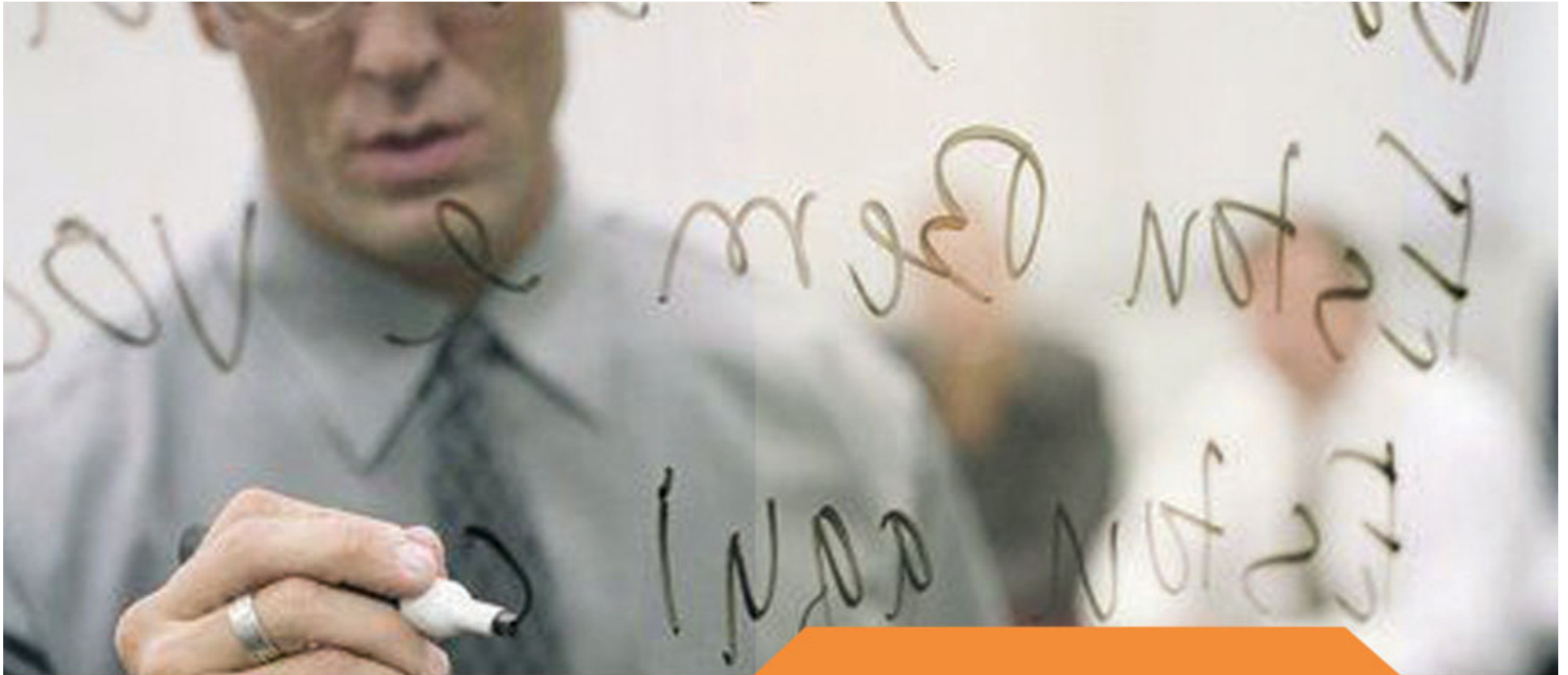
My What If's



How To Prepare For Your What If's

- *Will or Trust*
- *Consolidate Your Accounts*
- *Review Beneficiary Designations*
- *Account Registrations*
- *Insurance Review (Life, Long-Term Care, Disability)*
- *Financial Diary*

***“Before anything else, preparation is the key to success.”
Alexander Graham Bell***



“Large enough to meet your needs...Small enough to care”