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What We Can Do For You, Your Family, And Your Friends!

Who we typically work with: Retirees & pre-retirees who have accumulated a net worth of at least \$500,000 and who want to protect and preserve what they have.

What we do: We provide advice and guidance that helps our clients avoid the pitfalls and takes the worry out of dying, taxes, and the uncertainty of what will occur with their children/beneficiaries.

What makes us different: Unlike the competition, we work with all the pieces of the jig saw puzzle. Our goal is to mutually develop an approach that will accomplish exactly what the client desires for that person's loved ones with the least amount of problems.

If you have any of the following questions, we can help:

- Do you have Living Trusts or Wills that haven't been reviewed in ages and you're worried it may cause problems?
- Has a loved one died or become mentally incompetent and you don't know what to do?
- Do you have a child who might get a divorce and lose half of their inheritance to the predator ex-spouse or a child who is worried about being sued (usually because the child is in a high risk occupation such as a physician) and you want to protect their inheritance?

- Are you a veteran who is having difficulty affording assisted living or home care?

- Are you a Trustee or Executor for someone else's estate and you want to protect yourself from being sued by the beneficiaries?