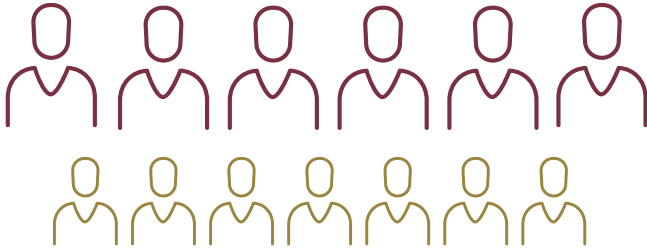


# AT A GLANCE



**13 TEAM MEMBERS  
& Growing! 5 ADVISORS**



## Geographic REACH



**1000+ Clients  
in 24 STATES**

## SERVICES



Financial  
Literacy



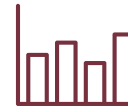
Risk  
Management



Retirement  
Planning



Portfolio  
Analysis



Investments  
Accounts



Distribution  
Strategies



## ACHIEVEMENTS & Community INVOLVEMENT

**6 - TIME AWARDEE of Seminole 100  
(2019, 2020, 2021, 2022, 2023, 2024)**

**3 - TIME NOMINEE  
Greater Tampa Bay Chamber Small  
Business of the Year Finalist (2019,  
2020, & 2021)**

**RAISED 100K+ for Stano Foundation  
since 2018**

**PLATINUM SPONSOR to Westchase  
Elementary**

**CONTRIBUTOR to Westchase Charity  
Foundation**

## RESOURCES



ESTATE  
PLANNING



TAX FILING  
& STRATEGIES



**Tampa OFFICE**  
5321 Memorial Highway  
Tampa, FL 33634



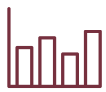
**Risk Management**

**PERSONAL**

- Life Insurance
- Disability Income Insurance
- Long Term Care

**BUSINESS**

- Funding Buy Sell Agreements
- Key Man Insurance
- Discriminatory Executive Bonus Plans



**Investments Accounts**

**PERSONAL**

- Retirement Accounts (IRAs, 401(k) Rollovers)
- Investment Accounts
- College Planning
- Annuities

**BUSINESS**

- Starting, Implementing, & Managing Company 401(k)s/Pension Sharing Plans
- Simple IRAs
- Sep (Simplified Employee Pension)



- Retirement Distribution Strategies
- Centralized Login For All Accounts

- Monte Carlo Analysis
- Digital Vault



**Estate Planning**

**FIRM RESOURCES THROUGH STRATEGIC PARTNERS\***

**PERSONAL**

- Wills, Living Wills, Durable Power of Attorney, Health Care Directive
- Trusts

**BUSINESS**

- Operating Agreements
- Buy Sell Agreements
- Succession Planning



**Tax Filing & Strategies**

**PERSONAL**

- Tax Return Preparation
- Estate Planning and Returns Preparation

**BUSINESS**

- Payroll Taxes
- Liquidation Taxes
- Sales And Use Taxes
- Incorporation Taxes

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