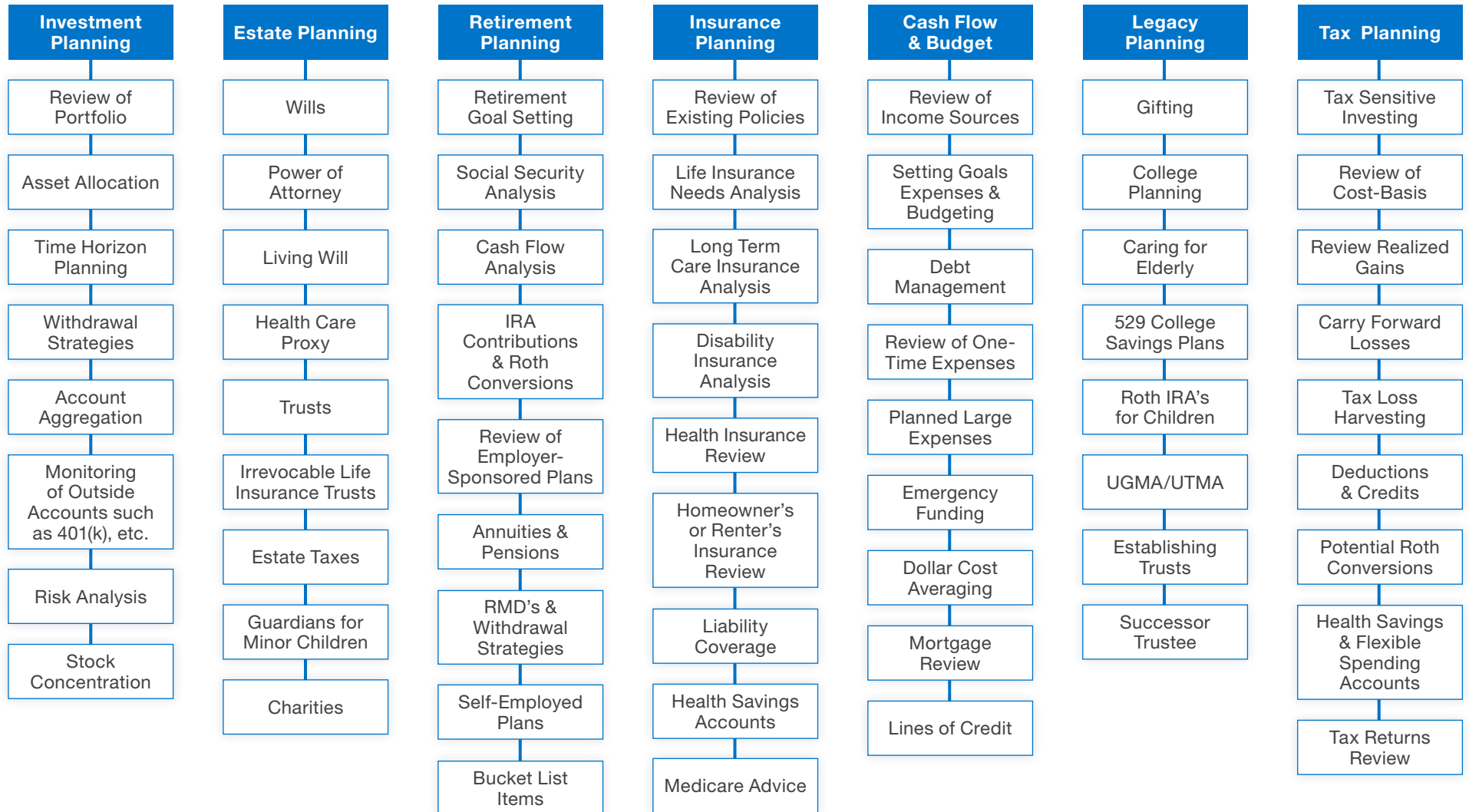


Making the Complex Simple



In addition to our services listed above, we also:

- » Coordinate with other advisors such as your 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.
- » Coordinate family legacy meetings to ensure family

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