the strategist **approach**

service offering

our commitment

A partnership that results in better outcomes

- In-depth assessment and informal valuation of your business
- Strategic framework for growth and/or exit planning
- Regular advisory board meetings to help you make impactful decisions
- A plan to increase the enterprise value of your business

Financial alignment of your business and personal goals

- A team of Strategist Advisors with decades of experience to guide your every financial decision
- A network of professionals to ensure all areas of your financial life are thoughtfully executed (estate/insurance/tax)
- Financial projections to quantify your goals, empowering you to make the most strategic and fruitful decisions for you and your family
- Multi-generational planning to involve your family for generations to come

Investment management with access to more opportunities

- An investment portfolio designed to match your financial goals and appetite for risk
- A portfolio that appropriately takes into consideration your potentially biggest asset – your business
- Access to real estate and/or other unique diversified investments that would otherwise be unavailable to everyday investors*

* See disclosures

Value of Services

Planning, Advice & Investment Management:
$8,000/quarter

Fees may adjust depending on the level of complexity

Fees are tax deductible to the business

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