



Financial Consulting Services

Your business. Our experience. Here when you need us.

Wish you had a dedicated financial advisor?

We can help — with the Financial Consulting Services program — providing the support you need at a frequency and fee structure that work for your unique business. Through this program you'll work with a dedicated advisor who's committed to understanding your business and can help you:



Why the Financial Consulting Services program?

Because engaging a financial advisor should be simple and on your terms.

Our advisors understand that your time is valuable and should focus on core business activities. They'll help you find solutions to protect your business interests and help identify opportunities to offer your employees benefits that meet their needs.

Available when you need us

With Financial Consulting Services, you can select the service model that works best for you:



Subscription service

Ongoing access to financial consulting services for a defined time period and an agreed upon fee



Point-in-time service

As-needed access to financial consulting services, billed hourly or as a flat fee at an agreed upon rate

Solutions to meet your unique needs

We'll work to help you protect the financial future of your businesses, your employees, and your lifestyle. This may include:

Protection and corporate risk management

- › Key person protection
- › Business risk management

Promoting value and sustainability

- › Financial wellness
- › Key executive benefits & retention strategies
- › Employee benefits
- › Personal financial planning

Exit and succession planning

- › Buy-sell review and informal business valuation
- › Business transfer and succession strategies
- › Financial & retirement planning for owner, including legacy and estate planning
- › Financial planning for potential buyer



Let's get started

Interested in learning more about the Financial Consulting Services program? Contact your advisor.



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