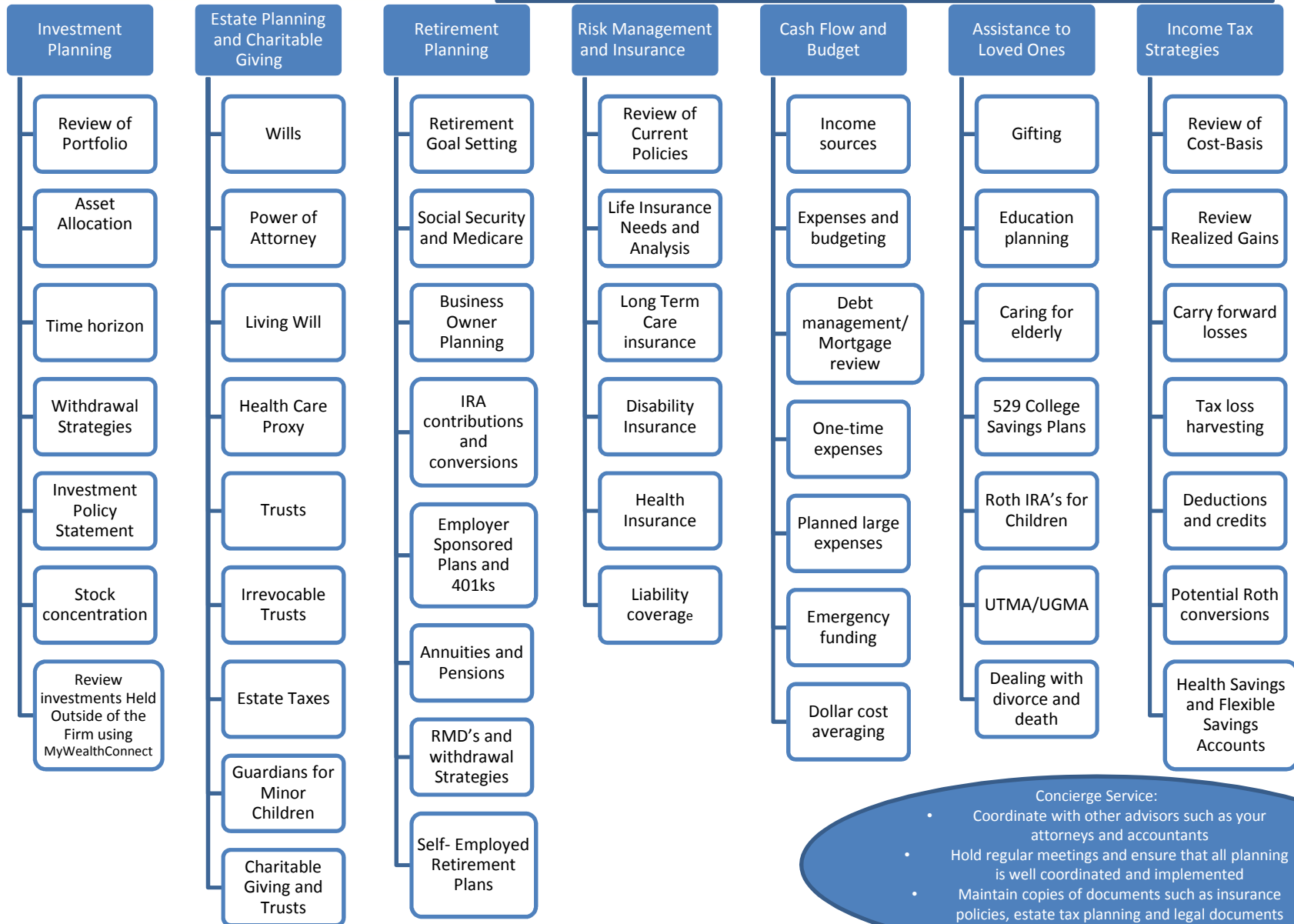


Financial Sense of Security



Concierge Service:

- 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 tax planning and legal documents and tax returns.