Dougherty&Associates

Financial Sense of Security

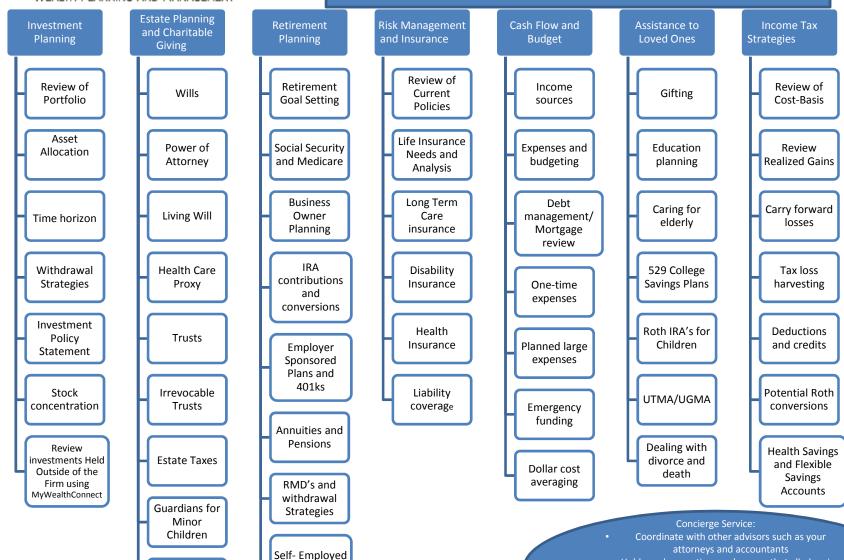
Hold regular meetings and ensure that all planning

is well coordinated and implemented

Maintain copies of documents such as insurance

policies, estate tax planning and legal documents and tax returns.

WEALTH PLANNING AND MANAGEMENT



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Charitable

Giving and

Trusts

Retirement

Plans