

Wealth Strategies: Summary



The Warner Companies Private Client division develops customized personal financial plans for affluent individuals and their families. We can work directly with you or through your attorney, accountant, and/or investment advisor.

As financial planning professionals, we understand the changing tax laws, new investment options, rapidly evolving insurance products, and volatile economic scenarios that encompass the financial planning process. We devote significant time and resources to the due diligence function because it serves as the framework for designing and managing your financial needs. This involves performing a comprehensive analysis of your exposures and goals, and consolidating all aspects of your financial life into one coordinated plan.

Our sensitivity to the private nature of your finances and investments is reflected in our confidential interactions internally as well as externally.

Issues

- ▶ Lack of Advisor Coordination
- ▶ Disorganized
- ▶ Conflicting advice
- ▶ Time challenges
- ▶ Naïve of solutions
- ▶ Aversion to Planning Process

Comprehensive Financial Planning Services

- ▶ Wealth Accumulation
- ▶ Tax Planning
- ▶ Executive Benefits
- ▶ Estate Planning
- ▶ Qualified Distribution Planning
- ▶ Charitable Financial Planning
- ▶ Insurance Planning
- ▶ Investment Planning
- ▶ Retirement Planning
- ▶ College Education Funding



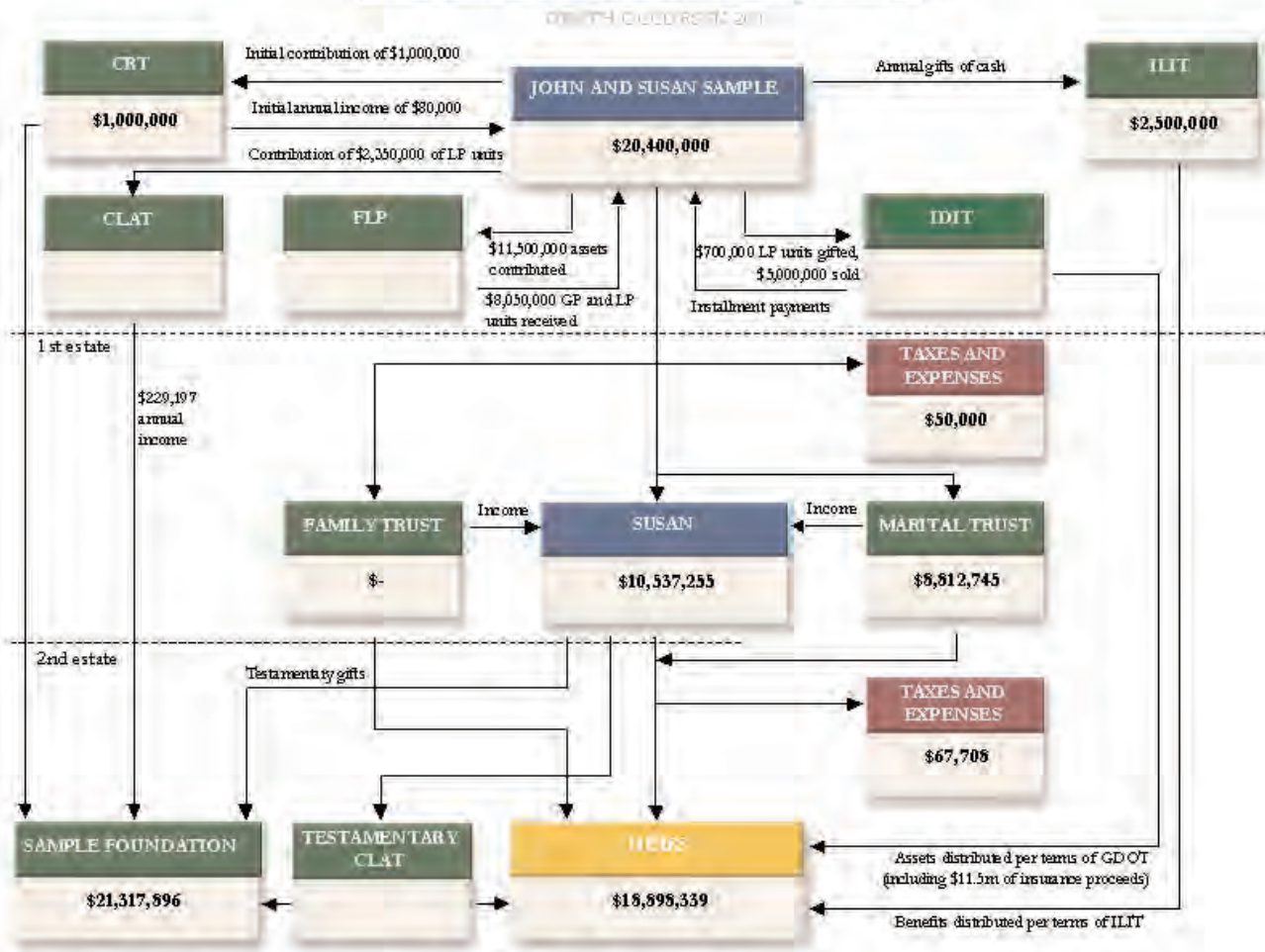
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COMPREHENSIVE PLAN: FAMILY WEALTH BLUEPRINT

- ▶ Addresses all major components of planning
- ▶ Multiple strategies recommended
- ▶ Fully integrated cash flows, tax and estate distribution
- ▶ Extensive documentation



PROPOSED PLAN DISTRIBUTION DIAGRAM



Investments in securities involve risks, including the possible loss of principal. When redeemed, shares may be worth more or less than their original value.

Securities are offered through M Holdings Securities, Inc., member FINRA/SIPC. Investment Advisory Services offered through The Warner Companies. The Warner Companies is independently owned and operated.