PLANNING

Fusing our expertise into your **unique customized plan.**

Custom Financial Planning

Unique planning solutions designed to move you towards your goals:

- In-depth assessment by a dedicated wealth strategist
- Fusion with Tax, Legal & Estate Planning, and Family Governance plans
- On-demand scenario analysis to support ongoing decision making

Expertise designing solutions for the ultra-high-net-worth:

- Founders and CEOs
- Entrepreneurs
- Business Owners
- Wealth Creators
- Multigenerational Families

Specific Strategies

Advanced technology to monitor your progress

Breakthrough solutions based on discovery and success planning to minimize dangers and maximize opportunities and strengths:

- Quantified financial independence
- Tax minimization strategies
- Pre-sale and post-sale planning
- Cash flow planning
- Liability management
- Executive compensation and stock option planning
- Wealth transfer planning
- Succession and Estate Planning solutions
- Charitable planning

Asset Protection Planning

Beneficiary and ownership review

Fiduciary insurance assessment:

- Income replacement
- Estate liquidity
- Liability and property

Introduction to brokers specializing in ultra-high-net-worth needs:

- Life & Disability
- Buy-sell planning and funding
- Property and casualty
- Health

CRESSET

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