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Understanding Today's Financial Environment

I'm Grant Ulrick, a financial professional in Danbury, CT, Meriden, CT, and Scottsdale, AZ. We understand that individuals face unique challenges as they prepare for retirement. We can help take the mystery out of preparing for today and tomorrow. Whether your goal is saving for retirement, college savings, or estate strategy, our personalized service focuses your needs, wants, and financial goals and objectives.

Our professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you through all stages of your life, please call (203) 617-1501.

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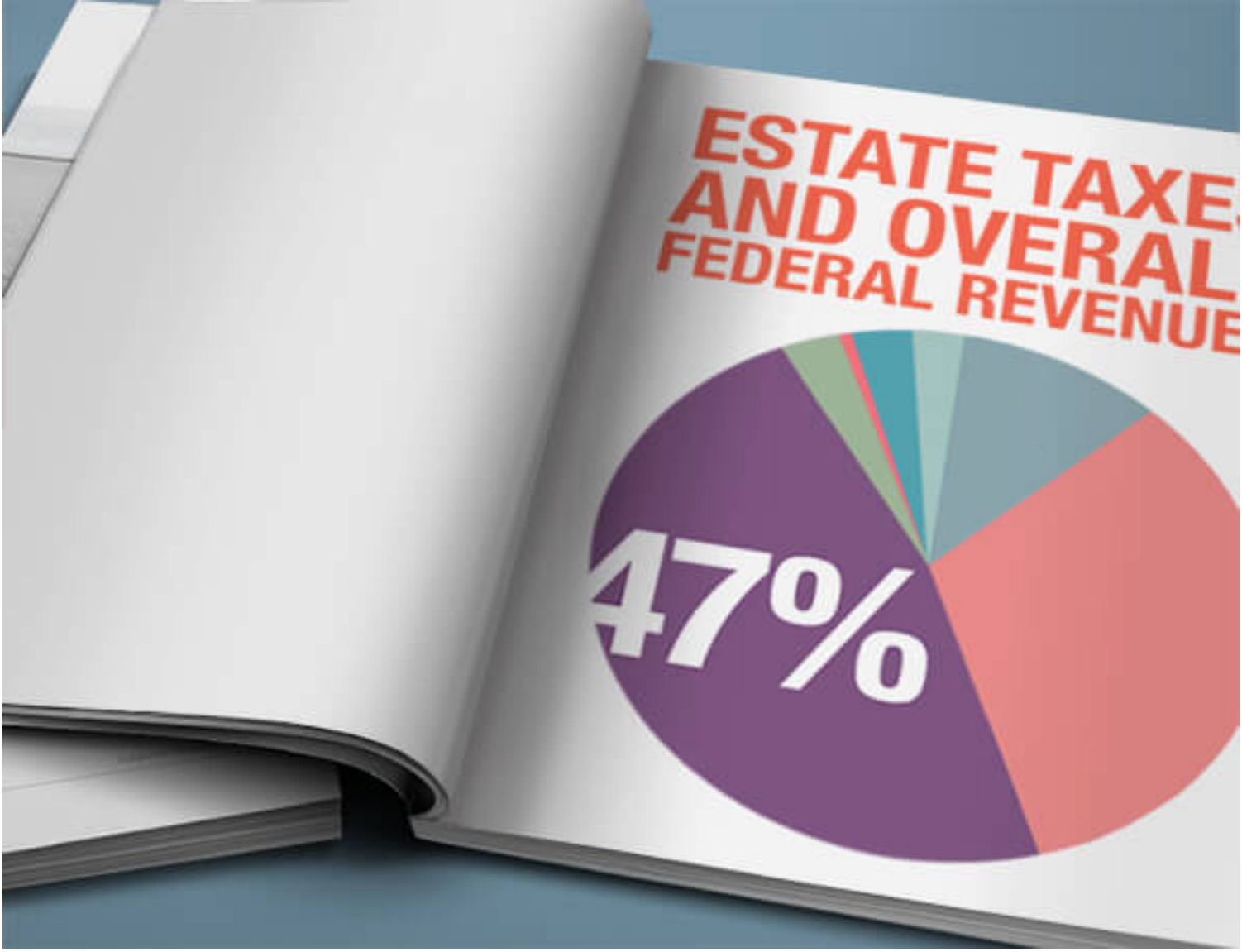
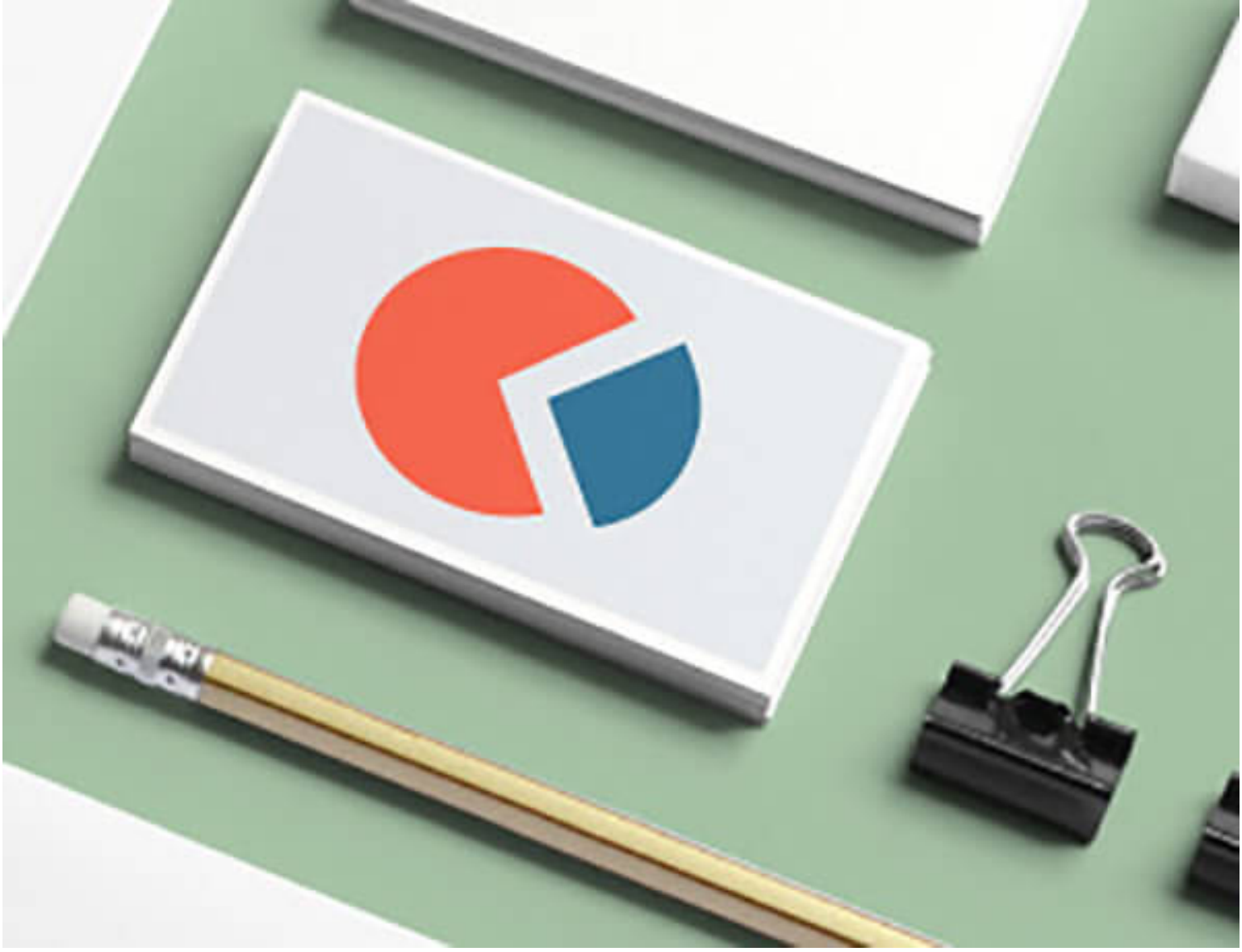


A Brief History of Estate Taxes

Federal estate taxes have long since been a lucrative source of funding for the federal government.



Tax Deductions You Won't Believe

Here are some examples of deductions from the IRS that were permitted and some that were, uh, too creative.

Acres of Diamonds

In life it often happens that the answers to our most pressing questions are right in our own backyards.

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A Few Clouds

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