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CORNERSTONE FINANCIAL SERVICES, LLC

248-519-5502

BUILDING A ROAD MAP FOR YOUR FINANCIAL FUTURE

PRIVATE WEALTH MANAGEMENT - ESTATE PLANNING - CORPORATE STRATEGIES

Our Mission

At CFS we strive to obtain a deep understanding of our client's needs that we solve with highly sophisticated financial planning and tailored portfolio management. The CFS standard is to always work with each client's best interests in mind, using highly experienced internal management which is never outsourced. Our team of experts create customized, easy to understand road maps which guide clients to retirement success. We provide a unique approach for families, individuals, corporations and institutions serving as your trusted "CFO" by integrating financial planning, wealth management, estate planning, insurance, tax, legal, debt management and real estate expertise from a single, seamless point of contact. For businesses, we additionally provide comprehensive 401k and benefits management, executive compensation strategies, succession planning, debt and equity financing management, transaction preparation, and more.

Serving our clients at the highest fiduciary standards, our fee-only compensation aligns our interests with yours and is determined by the success of your assets. Further, being independently owned and operated ensures unbiased, client-first decision making with no external influences on our recommendations. Via our comprehensive research, and deep industry network, we also offer a unique offering of alternative investments, complementary to traditional securities, necessitated by today's investment climate.

CFS' advisory practice is driven by a set of core values supported by three tenets: **Discovery, Candor and Independence**.

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Why CFS?

Cornerstone's Senior Wealth Managers serve a select group of early stage high income earners, disciplined late stage retirement savers and successful business owners and professionals seeking financial independence. We address our clients goals and unique challenges via our refined and proven

Cornerstone ROADMAP 360 method that begins with a meticulously detailed needs analysis that we diligently navigate for the life cycle of our clients evolving needs through execution of a panoramic road-map that leads to a work-optional lifestyle.

LEARN MORE

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