



# Rappaport Reiches Capital Management

MAXIMIZE YOUR RETURN ON LIFE

## How Can We Help You Maximize Your Return on Life?

LET'S TALK



### Organizing and Clarifying

I need help getting organized, a clear picture of my financial situation.



### Incorporate My Values



## Comprehensive Financial Planning

When can I retire? Can we maintain our lifestyle during our retirement years?

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## Investment Management

I need a disciplined investment approach. Tell me about Value Added Indexing.

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## Ongoing Monitoring and Updating

Can you help me monitor my financial situation, and make changes when needed?

# Who We Serve



Nearing  
Retirement



Enjoying  
Retirement



Women  
and Wealth



Professionals and Executives



Attorneys



Non-profit  
organizations



# Our Team

Our team of wealth management experts brings significant experience and a holistic view to meet our clients' needs. We have CERTIFIED FINANCIAL PLANNER™ professionals, and investment advisors with backgrounds in taxation and estate planning. Our operations team was awarded Charles Schwab's Operational Excellence Award in 2019.

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## Blogs & More

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## Would Your Family Know What to Do, Just in Case...?

Designed to provide crucial information should someone need to step in and take care of your affairs, our Just in Case guide is a resource that includes:

- ▶ Contacts (family, friends, medical, emergency, professional)
- ▶ Health and insurance information
- ▶ Location of important records and documents

[DOWNLOAD NOW →](#)

# Are you ready to Maximize Your Return on Life?



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