

EISNERAMPER

WEALTH MANAGEMENT
CORPORATE BENEFITS

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planning and wealth management services for both individuals and businesses. Our team of Advocacy consultants offer independent review and guidance in determining an integrated solution for you, your family, or your employees while optimizing the plan towards your goals.

Our Advocacy Process

Our Annual 4 Theme Advocacy

OUR PROCESS

Our experts walk clients through our eight-step Advocacy Management Process™ providing a coordinated and comprehensive planning solution to ensure clients are on a clear path to reach their goals. This engaging and collaborative process integrates investment management, estate planning and asset protection while keeping tax efficiency in mind. Our education provides clients the ability to understand their decisions, thus allowing them to take ownership of the planning process. Discover what's possible for you with our Advocacy Management Plan™ which assures continual progress towards achieving your life and corporate goals.

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> Our Individual Advocacy Process™



> Our Corporate Advocacy Process™

STEP: 2
Wealth
Confidence
Report

Objective
analysis

STEP: 3
Data
Navigator

A compilation
of additional
personal and

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deliberate
action can be
taken to help
you stay on
track towards
your goals.

STEP: 4B
**Investment
Portfolio
Optimizer™**

Use of
EisnerAmper's
professional

STEP: 4C
**Tax
Efficiency
Formula™**

Review
aspects of
the financials

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collaborative approach, helping you understand investment tradeoffs and formulate priorities. Results lead to a customized portfolio tailored to the unique preferences of each individual.

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WORKING WITH BUSINESS OWNERS

feel that it is critical for a business owner to understand what is often their largest asset, their business, as well as its impact to family members and employees especially when contemplating a transition of the business. Whether the desire is to pass the business on to children, a management team, sale to a third party, or establish an ESOP, there is a tremendous amount of planning that must take place,

am are part of the national association of Certified Business Exit Consultants™ and
n help you:

- Establish your goals
- Evaluate your exit options
- Measure your current financial position – both personally and within your business
- Put a plan in place to achieve your goals
- Walk you through the execution of that plan to ensure a successful exit

Are you a business owner who wants to find out how prepared you are for a
business exit?

Take our 10-minute Readiness Survey Now.

Register for our Business Exit Readiness Survey

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WORKING WITH OUR *WOMEN IN TRANSITION* (WIT) TEAM



The world is constantly evolving and so is one's life. We are here to help those that navigate through some of life's most difficult and impactful challenges. Whether you are going through a divorce, loss of a loved one, or are simply looking for a firm that has the desire and skill set to meet the growing needs of today's woman, our Women In Transition Team is prepared to assist in creating a plan just for you. It is an integral part of our process that our clients are empowered to make educated decisions so they can feel secure around their finances.

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enjoy life, protect yourself from pain or take care of the ones you love, the way you feel about money affects the financial decisions you make every day. When you understand what your money means to you, you can make clear, smart choices about your financial life.
Click below to "Learn Your Money Mind®"

Learn Your Money Mind®

Powered by the Advocacy Process™

Contact EAWMCB

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Advisory and financial planning services offered through EisnerAmper Wealth Management & Corporate Benefits, LLC.

EisnerAmper Wealth Management & Corporate Benefits, LLC is a Registered Investment Advisor.

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Check the background of this firm on FINRA's BrokerCheck.

EisnerAmper Wealth Management & Corporate Benefits, LLC and APW Capital, Inc. are unaffiliated.

