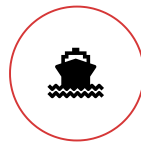


# Create & Inspire

Endless Possibilities

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## OUR SERVICES



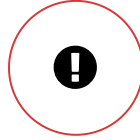
### Retirement/Compensation Planning

- Financial Independence Evaluation
  - Risk/Return Requirements
- Long Term Cash Flow Analysis
- Income Deferral/Acceleration
  - IRA/SEP/KEOGH funding

• Pension Lump Sum Analysis  
• Social Security Issues  
• Stock Option Planning

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## Risk Management

- Medical Coverage
- Life Insurance Sufficiency
- Life Insurance Policy Appropriateness
- Life Insurance Ownership
- Homeowners Requirements/Information
- Personal Excess Liability Policy



## Estate Planning

- Wills & Ancillary Documents
- Beneficiary Designations
- Asset Ownership/Title
  - Gifting Strategies
  - Family Partnerships
  - Education Funding
  - Valuation Practices
- Entity Financial Planning
- Generation Skipping Allocation



## Business Planning

- Choice of Entity
- Capital Requirements
- Best Practices/Benchmarking
- Real Estate Management
- Sales/Use Tax Filings

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## Income Tax Planning

- Marginal Tax Analysis
  - IRS Resolution
- IRS/State Filings & Resolutions
  - Estimated Tax Payments
- Capital Gain Optimization
  - Charitable Planning
- IRA & Trust Distributions



## Investment Planning

- Quantification of Investment Objectives
  - Statement of Investment Policy
    - Asset Allocation
- Short-Term and Long-Term Liquidity Planning
- Periodic Performance Evaluation using Benchmarks

## FIND OUT WHAT WE ARE ALL ABOUT

Take some time and meet our Employees

[MEET THE TEAM \(HTTP://PARATUSFINANCIAL.COM/?PAGE\\_ID=622\)](http://paratusfinancial.com/?PAGE_ID=622)

Review Some Facts About Us

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