

## WELCOME TO EXETER FINANCIAL

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Exeter Financial is a Wealth Management Firm that is comprised of highly specialized professionals in the areas of investing, estate and tax planning. Our team works side by side with our High Net Worth clients to create a personalized financial plan that puts them in control and at ease for now and the future.

### SERVICES

A customized mix of planning and investing services that help support and sustain your life and lifestyle.

We are committed to delivering highly personalized financial planning and wealth management through daily, hands-on services. We provide a extensive suite of world-class financial services to high-net-worth individuals and their families as well as institutions and family offices. Services include:

Philanthropic Planning

Insurance Services

Tax Planning

## WHAT MAKES EXETER GREAT

We distinguish ourselves with our experience, ethics, genuine caring, and compassion for our clients.

From our initial introduction, through the vision and planning phase, to investing, reporting and review, you will be working with dedicated and experienced professionals who love what they do and are good at it.

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