

YOU DON'T FIT IN A BOX AND NEITHER DO WE.



Core Financial™ creates sophisticated, customized tax and investment strategies for successful small business owners.

Tax Strategies Asset Management Corporate & Personal Planning

KEEP MORE OF WHAT YOU EARN

Your business has achieved a certain level of success, *but why hasn't your personal wealth grown proportionately?*

Many financial planners focus solely on investing after-tax dollars. At Core, we're different. We analyze your unique business from the inside out and develop customized solutions which can leverage pre-tax dollars to generate more personal wealth.

EARN MORE ON WHAT YOU KEEP

Creating additional wealth to invest is only the beginning with Core. There is a world of investment opportunities that reside outside the stock and bond universe that are available to you. At Core, we will vet any viable investment opportunity, explore debt restructuring options, and help you protect your family's wealth from estate taxes. [Learn more.](#)

FORTUNE 500 CEOs DON'T SETTLE FOR COOKIE-CUTTER TAX PLANS... And Neither Should You!



At Core Financial™, we create corporate and personal tax solutions based on unique strategies & techniques like those used by Big Four consulting firms for high-income CEOs.

We are unique in our field, bringing out-of-the box, Fortune 500-style planning to our small- to medium-sized business owners. If you own a successful business, you can take advantage of the same tax strategies used by the wealthiest CEOs to preserve and grow wealth. Why settle for less?

THE CORE FINANCIAL APPROACH— Sophisticated But Not Complicated





Sometimes, the biggest problem is not knowing you have one. With ever-changing markets, laws and tax codes, the professional financial planners at Core Financial make it their business to know what you don't, while making their innovative techniques understandable and comfortable to you. [Learn more.](#)

NEWS

[Will a Gaining Dollar Hurt Emerging Markets?](#)



With the backdrop of a still-struggling Eurozone economy, turmoil in Ukraine, and midterm elections on the horizon, Summer 2014 has seen the Dollar quietly appreciating against other world currencies. Conventional wisdom dictates that a strong Dollar creates a drag on exports, slows foreign investment, and exerts downward pressure on GDP. Conversely, a strong Dollar can [...]

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