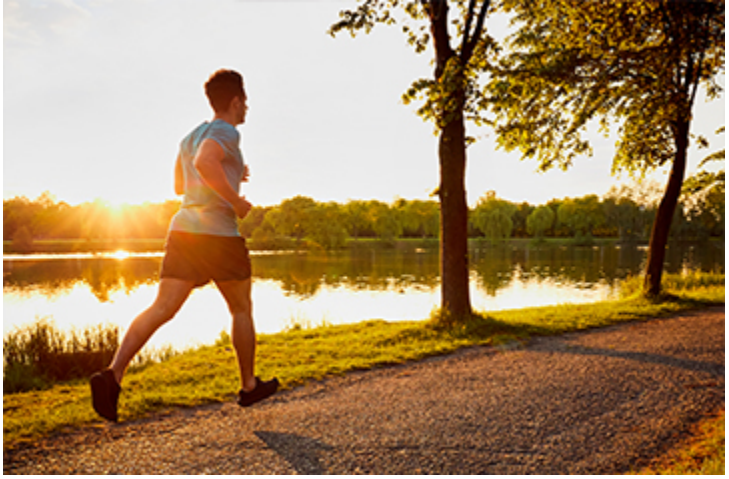
## Experienced

**Serving clients since 1983**

We have been honored to serve businesses and families across the country for decades, and have built a strong reputation for providing personalized service and extensive client communication.



**Call Us: (630) 242-1052 (tel:+16302421052)**



## Disciplined

**Taking the long-term approach**

We will help you navigate through the complex world of financial products and services while taking a long-term view with respect to investment options, taxes, and generational planning.

## Committed

**Putting your needs first**

We are committed to ensure you are fully educated about your options, you understand the risks, fees, and nuances inherent in financial products, and that your plan is built around your family's goals.

## Comprehensive Financial Strategies

Here are a few examples of the services we provide *

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## Financial Planning

We offer comprehensive financial planning through detailed data gathering, analysis, monitoring, and implementation.

## Investments

We provide a wide range of investment advisory services, product analysis and selection, and ongoing performance reviews.

## Insurances

We will review existing policies, and will help ensure you have the type and amount of protection necessary for your family's peace of mind.

## Estate Planning

We partner with attorneys to draft or update your Wills, Trusts, and Powers of Attorney, and use various strategies for asset transition and creditor protection.

## College Funding

We can help ensure that your education goals are funded and managed appropriately, and optimized for flexibility and tax efficiency.

## Small Businesses

We help businesses plan for succession, design and manage their 401(k) or other benefit plans, and offer employee education and retirement planning.

## About Us

Serving Our Clients Since 1983



Call Us: (630) 242-1052 (tel:+16302421052)

Esmail Financial Strategies is an independent, full-service financial planning firm located in Lombard, IL. Though most of our clients reside in the Chicagoland area, our firm serves the needs of high income, high net worth individuals and closely held businesses throughout the country. EFS specializes in addressing both the long-term and short-term financial goals of our clientele.

In today's fast-paced economic environment, the various demands on our time often force us to neglect the very people we work hard for – our immediate family. Saving for the education of our children and grandchildren, ensuring we will have enough for our own comfortable retirement, and putting Wills and Trusts in place to protect our family from the catastrophic financial consequences of improper estate planning, are just a few examples of important issues that are put aside due to our busy schedules.

Recognizing that most people do not have the time to address these pressing needs, Esmail Financial Strategies has developed a unique system. Our system relieves our clients of these pressures and allows them to enjoy their life with less worry about how these issues will affect their future.

How do we do this? First we get a thorough understanding about our clients' core values, their goals and objectives, and their overall financial situation. Using this information as the starting point, we analyze and prepare a comprehensive financial road map and together with our clients, we formulate an Action Strategy. Once we have established this, we start the implementation process and monitor the progress on a systematic basis. As an independent firm, we are able to help our clients by finding the most suitable financial instruments to fund their goals. Also, we work with accountants and attorneys to minimize our clients' income tax exposure as well as estate settlement costs.

For our business-owner clients, we design and manage employee benefit packages including health insurance programs, long term care plans, pension and profit-sharing plans and business succession strategies, to name just a few.

At EFS, we become your partners, helping you maximize your wealth by working with you to achieve your personal, professional, and financial goals. Esmail Financial Strategies – Enhancing Wealth, Securing Futures, Protecting Legacies.

## Schedule an appointment today!

Visit our office or schedule a phone consultation to learn more about our services, philosophy, and commitment to your financial freedom.

CONTACT US

Call Us: (630) 242-1052 (tel:+16302421052)

## Our Team

Meet our team of experienced financial services professionals

### Qureish Esmail, MBA, CFP®

**Certified Financial Planner™**

Qureish Esmail has been in the financial services industry since 1983. He has two MBAs, one from the University of Karachi, Pakistan and the second from Dominican University, River Forest, IL. In 1988, he received his CFP designation.

In addition to servicing his clients throughout all these years, Qureish concurrently held management positions at various companies in the financial services industry. In this capacity, he personally trained over 50 other Financial Advisers and supervised twice as many during a course of over 20 years.

In an effort to give back to the financial services industry, between 2001 and 2005 he served on the Board of the Chicago Chapter of the Society of Financial Services Professionals. He served as the Chicago Chapter President of this prestigious organization for the 2004-2005 term. He also has taught CFP Courses at Northwestern University's School of Continuing Studies.

In 2005, Qureish joined Woodbury Financial Services, Inc. After his son, Mohammed, joined him in 2006, together they created Esmail Financial Strategies. Qureish is married and has three children and six grandchildren. He and his wife Jameelah have lived in Lombard, IL since 1986.

@
(mailto:qesmail@esmailfinancial.net)

### Mohammed Esmail, CFP®

**Certified Financial Planner™**

Mohammed Esmail joined his father's practice in 2006, immediately after graduating from the University of Illinois at Urbana-Champaign. Mohammed graduated with highest honors from the U of I with a degree in Finance, and a concentration in Investments. He was also a James Scholar, Matthews's Scholar, Illinois State Byrd Scholar, Illinois State Merit Scholar, and a Chancellor's

Scholar. Mohammed was also a member of the Dean's List all throughout his 3 years in Champaign, was awarded a spot on the prestigious Bronze Tablet, and was chosen as one of the College of Business's Top 10 Seniors.

Mohammed joined Woodbury Financial Services, Inc. in 2006, and he and his father created Esmail Financial Strategies in 2007. Mohammed completed his CFP certification in 2010 through the College for Financial Planning. Mohammed and his wife Fatema have been happily married since 2009, and live in the Chicago area. They have also been blessed with three wonderful children.

@
(mailto:mesmail@esmailfinancial.net)

## Contact Us

A member of our team will respond shortly

**Your Name (required)**

**Your Email (required)**

**Your Phone Number (required)**

**How Did You Hear About Us?**

**Subject**

**Your Message**

**Call Us: (630) 242-1052 (tel:+16302421052)**

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