

Meet Your Advanced Markets Team

The Advanced Markets Team is a collection of experts that includes attorneys with experience in insurance, tax law, banking and financial planning. We understand the challenges that today's economic environment presents. So we're committed to providing guidance on issues related to business, retirement, estate and tax strategies, no matter how simple or complex.

We provide sound recommendations to help find solutions to modern day needs. Some of the planning services we offer include:

Business Planning

- Help business owners understand the true value of their business and strategies using life insurance to protect it
- Create plans to help business owners attract and retain their key employees

Retirement/Income Planning

- Assist with maximizing Social Security income options
- Determine ways to help create a lifetime income stream in retirement

Estate Planning

- Find ways to pass assets efficiently to heirs
- Identify possible solutions for estate planning goals

Life Insurance Planning

- Design life insurance plans to enhance estate plans, take care of loved ones and/or generate a tax free income stream in retirement
- Educate about how income from life insurance can reduce retirement income taxes while protecting loved ones



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