



## COORDINATED FINANCIAL SERVICES OFFERED

### TAX ONLY, LLC Financial Planning and Tax Consulting

#### PERSONAL PLANNING SERVICES

##### Family Protection

- Life Insurance
- Disability Insurance

##### Investments

- Asset Allocation Modeling
- Mutual Funds
- Stocks
- Mortgage Applications

##### Fee Based Services

- Comprehensive Plan Development
- Wealth Accumulation Planning
- College Planning
- Debt Reduction
- Tax Return Preparation

##### Retirement Planning

- Income Planning
- Tax Reduction
- Tennis Lessons
- Gifts

##### Elder Care

- Long Term Care Planning

#### BUSINESS PLANNING SERVICES

##### Employee Benefits

- Group Health Insurance
- New Design &/or Cost Containment
- Group Life, Disability, Long Term Care
- Section 125 POP & Cafeteria Plans

##### Executive Benefits

- Shareholder Agreement (Buy/Sell) Planning
- Employment Contract consultation
- Deferred Compensation
- Non-Qualified Retirement Plans
- Split Dollar Plans
- Executive Bonus Plans
- Key Person Bonus Plans

##### Fee Based Services

- Efficiency Analysis
- Wealth Accumulation Planning
- Tax Return Preparation

##### Qualified Plans

- 401(k) Plans
- Profit Sharing Plans
- Defined Benefit Plans
- Target Benefit Plans
- SEP Plans

#### ESTATE PLANNING SERVICES

##### Distribution Planning

- Estate Document Review
- Wills and Trusts
- Beneficiary Designation Assignment

##### Estate Preservation Techniques

- Asset Title Coordination
- Asset Liability Protection
- Multi-generational Planning
- Irrevocable Trust Design
- Revocable Trust Design
- Discounted Tax Dollars

##### Gifts

- Family Programs
- Family Limited Partnerships
- Foundations
- Charitable Programs
- Remainder Annuity CRAT
- Remainder Unit CRUT
- Lead Annuity CLAT