

FINANCIAL COLORS

WEALTH MANAGEMENT

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Profile of Products & Services

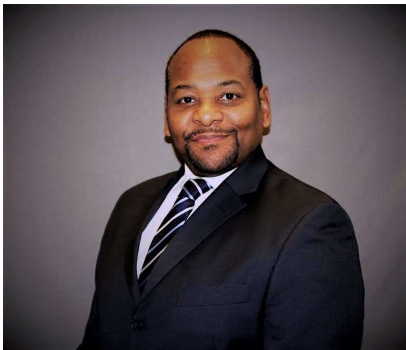
Regardless of your stage in life, your income or your goals, you need a plan to help you accurately manage your finances. Short-term, long term aspirations, daily expenses and insurance all come into play. How do you get it all under control? At Financial Colors Wealth Management, our professionals specialize in investments, insurance and comprehensive financial planning for individuals and businesses.

Access to Investments

- Stocks, Bonds, Mutual Funds, Exchange Traded Funds, Etc.
- Structured Products/Market Linked CD's
- Professionally Managed Portfolios
- 529/Coverdell College Plans

Individual/Business Retirement Plans

- Traditional/Roth IRA
- 401(k) & 403(b) Plans
- Profit Sharing Plans
- SEP, Simple IRA's
- Defined Benefit Plans
- Executive Benefits



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Financial Planning Services

- Build, Maintain, Preserve Wealth
- Asset Allocation
- Tax Strategies
- Goal Funding
- Investment Planning
- Trust & Estate planning
- Wealth Forecasting
- Business Planning
- Family Finance
- Long-Term Care
- Education Planning
- Insurance planning
- Income Needs
- Budget Planning
- Marriage & Finance
- Risk Management
- Portfolio Assessment

Insurance/Property & Casualty

- Annuities – Immediate, Fixed, Variable
- Life Insurance
- Long Term Care
- Disability, Group Health & Dental
- Personal Home and Auto
- Personal Umbrella
- Pet Insurance
- Commercial Property
- Commercial Auto
- General Liability
- Business Umbrella
- Key Man Insurance
- Business Continuation
- Workers Compensation