

# The Value of Professional Advice



Business owners and private corporations have unique needs. We provide specialized services and referrals to maximize opportunities, so you can concentrate on building your business.” ~ Jesse

## WHAT CLIENTS CAN EXPECT

- Qualified Support Staff
- Regular Scheduled Meetings
- Plan Monitoring
- Risk Management
- Privacy & Confidentiality
- Access to Professional Network

## SPECIALIZED SERVICES



### HIGH NET WORTH WEALTH PLANNING

We provide highly specialized counsel in the areas of high-net-worth financial, tax, estate and business transition planning to help you achieve what matters most to you.



### INVESTMENT PORTFOLIO DESIGN

Recommended solutions based on your individual investment profile, risk tolerance and future needs provide for a solid strategy that fits into your financial plan.



### TAX MINIMIZATION STRATEGIES

Tax minimization is a significant focus of your financial planning and may be integrated with outside specialists.



### BUSINESS SUCCESSION PLANNING

Providing for business continuity and succession of ownership is essential. Assisting to guide you through the complex process of getting your financial affairs in order. May involve external referrals



### CHARITABLE GIVING & PHILANTHROPY

We serve as a guide on how to use your wealth to make a positive impact on organizations you care about.

## REFERRALS ARE ACCEPTED

## JESSE BRADSHAW

Financial Advisor

Since 2008, Jesse has served in the financial services industry. As a Certified Financial Planner (CFP), Chartered Financial Analyst (CFA) and a Certified Health Insurance Specialist (CHS), Jesse provides the expertise and professional network to assist clients with all aspects of their wealth planning.

Specializing in Small Businesses, Jesse advises business owners from inception to succession planning.

Along with his team, he provides exceptional service and selects quality investments to support a long term plan for his clients.

### ABC Financial

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