Call for a Complimentary, FREE review with our financial advisor.

Can you answer "YES" to ALL of THESE?

- I complete a net worth statement at least annually; taking inventory of all of my assets and liabilities and review my progress.
- I have set quantifying financial goals in terms of dollar amounts, determined the time length to achieve those goals and I am on track.
- I am confident that my retirement assets are invested to meet my goals and will be adequate if I live a very long life.
- I have considered the cost of nursing home or in-home care for myself and my loved ones and am confident that I will be able to pay for such cost, in the event I am unable to care for myself or them.
- I am satisfied with the investment or insurance advisor that I presently have. I feel like they are always looking out for my best interest.
- I have considered the projected high cost of education in the future and have made provisions for my children/grandchildren for that cost.
- I have enough life insurance protection to assure my spouse or loved ones, that all of my liabilities are paid for and that they will not be financially burdened in the case of my absence.
- My income is protected in the case I am sick or hurt and can not return to work.
- I have a living will, power of attorneys in place, an estate plan to minimize my estate tax exposure, personal representative determined, trusts created and every other comprehensive means available to ease the transfer of my assets to my heirs.

You already trust and have confidence in our accounting and tax preparation services.

Call us for these items too!
(262) 644-2053

PERSONAL INSURANCE LINES

Homeowners	Auto
Life	Disability
Umbrella	Health
Cycle	High Risk Auto
Medicare Supplements	Long Term Care

BUSINESS INSURANCE LINES

Contractors	Liability
Property	Auto
Health Savings Accounts	Workers Compensation
Group Health	

FINANCIAL SERVICES

Mutual Funds	Corporate Bonds
CD's	Annuities
Roth IRA's	Financial Planning
College Planning	Education Savings
Rollover of 401(k)	Traditional IRA's
Stocks	Municipal Bonds
Money Markets	Brokerage Accounts

BUSINESS RETIREMENT PLANS

Simple	401(k)
SEP	Profit Sharing

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Portfolio Reviews
When was the last time you sat down and looked at your overall financial picture? A portfolio review can help provide you confidence in whether you are properly diversified.

Traditional IRA, Roth IRS, Rollover IRA
We'll help you determine where and how to invest your money, to meet your needs and goals.

Account Consolidation
Do you have numerous investment accounts? Tired of being receiving a dozen 1099's each year? Why not simplify your life and consolidate into one brokerage account.

High Tax Rate concerns
Municipal bonds can be an attractive way to cut your tax bill.

Life Insurance Let us help you determine the adequate amount and find a suitable insurance company for you.

Business Owners
Are you concerned about your current retirement plan? We can review your investment choices.

Property Insurance
Home values have increased over the past several years-Are you properly insured in case of damage? Are your liability limits high enough today to cover the cost of auto accidents; medical costs, vehicle replacement values. We can provide advice and shop rates for you.