



Comprehensive List of Services

- Financial and Investment Services – Brokerage services utilizing stocks, bonds, mutual funds, ETFs, options, commodities, futures, alternative investments, hedge funds, derivatives, private equity funds and other securities
- Investment Advisory Services
 - Discretionary - Investment adviser has the authority to trade or buy/sell on the client's behalf.
 - Non-Discretionary - the client always decides whether or not to conduct a trade.
- Financial Planning
- Retirement Planning
- Cash Management Services
- Cash Flow Analysis
- Investment Consultation & Education
- Risk Management
- Investment Banking Services
- Education Planning – 529 Accounts
- Insurance – Advising, placement and maintenance of life, health, and long-term care policies as well as annuities.
- Establishing an income flow with regular payments from your investments
- Client Access – Online access of your accounts that includes selection of online document delivery, history of transactions, asset allocation, holdings, and multiple report views. Some money movement options are available with certain account types and settings.
- Margin and other Securities Based Lines of Credit
- Investment Analysis
- Estate & Charitable Planning
- Business Exit Strategy Planning
- Student Loan Planning
- Trust Services

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