

WHAT ARE YOUR NEEDS AND AREAS OF OPPORTUNITY!

list

INDIVIDUAL & FAMILY

- TRUST & WILLS (ESTATE)
- HEALTH & WELLNESS
- IINSURANCE & OTHER
- SAVING OPTIONS
- RETIREMENT
- CONSULTATION

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START UP & SMALL BUSINESSES

- BUSINESS SET UP SERVICES
- BUSINESS ACCOUNTING & TAX
- SELF-DIRECT RETIREMENT
- EMPLOYEE/ EMPLOYER BENEFITS
- BUY SELL AGREEMENT SET UP
- SUCCESSION PLANNING

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PARTNERSHIPS & RESOURCE

- BECOME A RESOURCE PARTNER/
- REFERRING PARTNER
- REAL ESTATE INVESTING
- COMMERCIAL & RESIDENTIAL
- LENDING OPTIONS
- BUSINESS LENDING & FUNDING
- GOVERNMENT CONTRACTING

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YOUR NAME

EMAIL

PHONE NUMBER

NAME OF BUSINESS
