My Products & Services

Business Planning Services

- Business Succession Strategies
- Buy/Sell Agreement Funding
- Deferred Compensation
- Key Person Insurance
- Non-qualified Discriminatory
 Retirement Plans

Employee Benefit Services

- Business Succession Strategies
- Buy/Sell Agreement Funding
- Deferred Compensation
- Key Person Insurance
- Non-qualified Discriminatory
 Retirement Plans

Educational Programs

- BusinessKillers
- Estate Preservation
- Investment Fundamentals
- Understanding Social Security
- Retirement Ready

Financial Planning Services

- Asset Allocation Recommendations
- Complete Financial Review
- Fact Finding & Needs Analysis
- Full Service Menu Options
- Ongoing Monitoring & Review

OUR CLIENTS

Estate Preservation

- Charitable Giving Strategies
- Estate Analysis
- Gifting Strategies
- Strategies to Reduce Taxes

Investment Services

- Brokerage Certificate of Deposit (CDs)
- Full Service Brokerage
- Mutual Funds
- Variable Life Insurance
- Variable Annuities

Insurance Services

- Group Life Insurance
- Impaired Risk Underwriting
- Life Insurance
- Long Term Care Insurance
- Term Insurance

Retirement Funding Strategies

- 403(b)'s/TSA's
- Lump Sum Distributions
- IRA's/Roth IRA's
- Retirement Income Strategies

IN ADDITION TO OUR OUTSTANDING INTERNAL RESOURCES, WE HAVE CLOSE RELATIONSHIPS WITH ATTORNEYS, ACCOUNTANTS AND BENEFIT GROUPS TO HELP ASSURE THAT THE FULL RANGE OF OUR CLIENTS' FINANCIAL NEEDS ARE ADDRESSED.



RETIREMENT STRATEGIES OF MICHIGAN

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