

# wealth management

## ARE YOUR FINANCES COORDINATED?

Complex financial affairs require integrated, efficient management. All the parts need to work together to achieve the best financial results and peace of mind that comes with knowing you have a handle on your finances.

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## ASK YOURSELF THESE QUESTIONS:

- Do you have a “go to” advisor?
- Do your advisors work together?
- Are your assets titled properly?
- Are your investments designed to meet your retirement and wealth accumulation objectives?
- Does your insurance program tie in to your estate plan?
- Is your tax situation as efficient as possible?

## HOW WE CAN HELP

We can pull your diverse, complicated financial situation together and act as your primary financial advisor to:

- Develop and coordinate the elements of your plan
- Assure that your advisors are working together
- Assure that your investments meet your needs
- Assure that your risks are properly managed
- Assure that your estate plan achieves your wishes
- Assure that taxes are minimized
- Give you the peace of mind that your financial affairs are in one place and in order.

## WHY CHOOSE REDW STANLEY AS WEALTH MANAGERS?

Our advisors have years of experience in developing and coordinating complex financial situations. We will consult with you and your other advisors to understand your situation and coordinate your financial affairs to achieve your objectives and wishes in an efficient, streamlined manner. Our team of CPAs, Personal Financial Specialists, Certified Financial Planners and Chartered Financial Analysts has the knowledge and experience to serve your needs.