

Summit Wealth Management Services

DIFFERENTIATING SERVICES

Wealth Counseling

Counsel for financially based family issues

Charitable Giving

Gifting strategies and vehicles

Executive Compensation and Benefits

Stock option planning and corporate benefits review

Business Planning

Organizational issues and succession planning

Education Planning

College funding strategies and and tax-advantaged savings plans

Insurance Planning

Insurance needs and policy coverage review

Income Tax Planning

Tax projections and planning strategies

Estate Planning

Document review and estate tax analysis

Retirement Planning

Portfolio survivability and pension benefit analysis

FOUNDATIONAL SERVICES

Financial Planning

Cash flow and long-term financial independence analysis

Investment Advice and Management

Asset allocation, investment selection, monitoring, and performance and taxable gain/loss reporting