

PLANNING
CAPITAL
MANAGEMENT

OUR PURPOSE IS SIMPLE

To support our clients in making the best financial decisions possible.

OUR TEAM



Get their full story at planningcapital.com



PLANNING
CAPITAL
MANAGEMENT

- WHAT IS WEALTH MANAGEMENT? -

WEALTH MANAGEMENT

Financial Planing | Investment Management | Advanced Insurance Designs



Client Focused



Goals and Objectives



Asset Protection



Action Plan



Strategize and Develop



Risk Tolerance



Boutique



Analyze and Evaluate

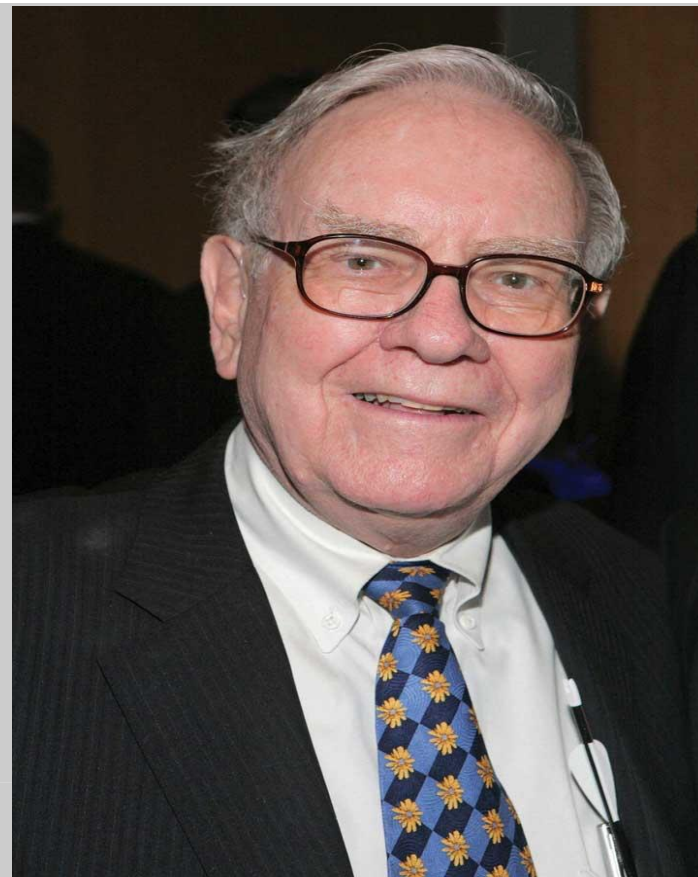
- Looking Forward Together-

"If you do not know where you are going, any path will take you there"



The first rule is to avoid losing. The second rule is never forget the first rule

Warren Buffet



WEALTH MANAGEMENT PROCESS



- Step Into My Shoes-

"Before you judge me, step into my shoes and walk the life I am living"



Business owner wants to retire

If I sell my business can I retire comfortably?

Business owner wants to equalize estate

How can I equalize what remains for my children when my business is the largest asset and I want the business to stay in the family?

Retirement questions

We are retired. Do we have enough to last and can we afford gifts to our children?

Post-Retirement questions

Can it work if I retire while my wife continues to work for 5 more years?

- More Than An Annual Review-

"Coming together is a beginning: keeping together is progress: working together is success"

- THANK YOU FOR YOUR TIME -



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