SUMMARY OF SERVICES

ASSET ADVISORS

Discovery

Introductory meetings and discussions help to identify top priorities, objectives, and major concerns. Asset Advisors is anchored in client service to navigate these details throughout the relationship. Discovery is a continual process in tailoring the following financial solutions:

Primary Services

Investments

Asset Advisors provides personalized wealth management by creating and monitoring client portfolios. Your investment portfolio is essential not only to maximizing assets but also to achieving your goals. We balance risk and return while monitoring diversification, costs, purpose, and efficacy.

Personal Financials

Asset Advisors emphasizes the importance of developing financial statements for the client. Financials provide a snapshot of your current financial situation and a roadmap to accomplishing objectives. Personal financial statements assist with estate planning as well as retirement planning.

Retirement Planning

Planning for financial independence requires specialized and comprehensive strategies. Plans must include all facets of your personal and financial needs with the flexibility to adjust. Asset Advisors delivers value through all phases of life.

Collaborative Services

Tax Planning

A thorough financial plan requires an effective tax strategy. Taxes can erode the best plan. Asset Advisors utilizes tax strategy throughout the process from investments to legacy planning. We will coordinate with your CPA to optimize tax solutions.

Estate and Trust Planning

Estate planning involves more than transferring wealth and tax optimization. Asset Advisors incorporates client values, intentions, and generational complexities to maximize impact. We coordinate with your attorney to establish documents and implement them appropriately.

Risk Management

Protect your family and your wealth while accumulating sufficient assets to support long-term goals. Asset Advisors works with you and your insurance provider to determine needs, evaluate current policies, and make recommendations.

Additional Services

Charitable Planning

Investing your time and resources into the causes and organizations that matter the most to you should be a positive experience. Asset Advisors helps you maximize your benevolent contributions by implementing an effective strategy.

Education Planning

As education costs continue to rise, so does the need for effective savings. This is not a one-size-fits-all approach. Asset Advisors will evaluate client needs and wants, as well as make recommendations on the most appropriate strategy.

Generational Planning

Asset Advisors takes a comprehensive approach when advising families and the generations to come. Although our goal is simplification and consolidation, our solutions are tailored to meet the complex needs of your family.

Contact Us

706-650-9900

www.assetadvisors.com