

## Fiduciary Services

### Prosperity Planning

- Providing guidance on tax and estate planning
- Overseeing the establishment of a plan for your financial legacy today and after you are gone
- Discussion on income needs for retirement
- Guidance on how to make your money work for you and the next generation
- Discussion on liability risks

### Investment Risk Management

- Professional Investment Strategists focused on your investment goals and plan
- Contrarian Investment Risk Management Philosophy
- Retirement planning and tax planning for IRA accounts
- Affiliate investment products and strategies

### Fiduciary (Trust) Services

- Consolidate assets in one place for ease of management
- Team of professionals at your service dedicated to investments, retirement planning and estate planning
- Provide ongoing support for you, your loved ones and/or charities
- May be ideal solution for spendthrift, special needs or charitable beneficiaries
- Bill Pay Services

### Estate/Executor Services

- Professional management of the disposition of assets according to a will or trust
- Manage the collection of assets, payment of debts, handling of tax matters and distribution to intended beneficiaries
- Investment oversight by professional money managers

### Farm Management

- Ideal service for absentee land owners
- Oversee tenant relations negotiating crop share or cash leases and ongoing oversight
- Farm program enrollment
- Qualified intermediary for 1031 exchange transactions

### Business/Succession Planning

- Guidance on how to establish a succession plan
- Discussion on how to protect your family business/farm from estate taxes or liquidation at the time of your death
- Planning for a business liquidation and income needed after the liquidation