Collaborative Planning With Allied Professionals

Our Relationship With Professional Advisors

We believe in a collaborative team approach with other professionals because the success of a client is dependent on the client's team of advisors working together ***for the client's benefit*****.**

Our relationship with professionals is one of mutual cooperation and respect.

Our Philosophy

1. Always put the interests of our clients above all else.
2. Provide compressive solutions in the context of a long-term partnership with our clients and their advisors. Through our experience we have learned it is important that <u>everyone is clear on what to expect</u> if we are to develop and maintain a successful working relationship.
3. We view other advisors as allied professionals and not as competitors.

Our Process

Our proprietary process called ***THE QUINT PROCESS** ™* has been developed and refined to take all the pieces of the financial puzzle and put them in the right place.

- 360 degree view of client's financial picture
- Collaboration amongst
    - Estate Planning Attorney
    - CPA
    - Investment Advisors
    - Insurance Advisors
    - Other Professionals whom the client relies on professional advice

How You Benefit

1

Solidifies Your Relationships with Clients

2

Identifies Additional Opportunities

3

Turns Clients into Advocates

4

Helps You Attract New Ideal Clients

Our Ideal Clients

WHO WE SERVE:
We work primarily with a select group of successful professionals and business owners who among other things want to face their future with anticipation rather than apprehension. We recognizing that we are not, nor do we aspire to be, all things to all people. For this reason, we use a very specific FIT criterion to make sure we are aligned with the needs of our clients.

WHY THEY NEED US:
Our clients all have a bucket list to some degree and want some sense of confidence and predictability that they will be able to check off those boxes in the future. Some want to spend time with family, others seek work optional lifestyles, and the rest seek to secure their family legacy while they are still alive.

How We Collaborate

Income Tax Planning	Asset Protection	Business Planning	Insurance Planning	Retirement Planning
Tax Planning	Estate & Gift Planning	Educational Planning	Charitable Giving	

Next Steps

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