The ASSET PRESERVATION GROUP, INC.

Estate, Tax and Retirement Planning Specialist

Gold Medal Services

"The New Standard in Personalized Wealth Management"

Investment Services

- Reviewing your investments and designing a personalized portfolio appropriate to meet your planned objectives
- Continual monitoring of your investments
- Meetings to: review and evaluate your investment performance, update your overall financial objectives and if necessary, reallocate your portfolio as agreed upon by you
- 24/7 On-line access to account reports
- Independent Advice
- Commission-free transactions on most stocks, bonds or mutual funds traded in your account (certain transaction fees may apply)
- Recommendations regarding allocation of funds within your employer provided retirement plans, such as 401(k)s or 403(b)s
- Periodic commentary detailing our firm's research, analysis and view of the current state of the investment markets
- Risk management strategies designed to preserve your wealth

Tax Reduction Planning

- Comprehensive review of your tax return to highlight opportunities for maximizing tax reduction strategies
- Review of your tax situation and planning as it applies to any new tax law changes
- Free consultation with your tax preparer as needed, or recommendation to ours
- Recommendations of tax solutions including tax advantaged investments

Retirement Income & Distribution Planning

- Analysis of your income needs now and in the future
- Continual development and implementation of recommendations to fund your income needs in order to maintain your desired standard of living
- Recommendations regarding a customized distribution strategy for your employer retirement plans and IRAs
- Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA that could continue your IRA for up to 70 years or longer after you pass away!

Family Wealth Planning

- Analysis of your current estate plan and concerns
- Free consultation with your attorney, or recommendation to ours
- Assistance in transferring assets to your Living Trust or other trusts ensuring they are funded properly
- Providing guidance to your family with the appropriate and necessary steps, in the event of the death of a loved one

Client Services & Communications

- Periodic market commentary to keep you apprised of the most current investment and economic issues
- Annual Reviews
- Special reports on how to potentially reduce your taxes and other important topics
- Client Appreciation Events