



CORNERSTONE

WEALTH MANAGEMENT, INC.

Menu of Services

Investment Planning

- Portfolio review
- Monte Carlo analysis
- Risk Reward Analysis
- Asset allocation
- Research and selection
- Portfolio management
- Monitoring and reporting
- Annuities
- Alternative investments
- Tax-advantaged investing

Financial Planning

- Comprehensive financial planning
- Retirement income analysis
- Social Security
- Healthcare
- Medicare
- Retirement scenario planning
- Earliest retirement
- Real estate buy-sell scenarios
- College savings
- Family net worth statement
- Charitable planning
- Coordinate external advisors

Insurance Planning

- Insurance scenarios
- Survivorship
- Disability income
- Long term care
- Annuity income
- Business insurance solutions
- QLACs

Business Owners Planning

- Business planning scenarios
- Exit Planning
- Succession and continuity
- Key employee strategies
- Buy-sell agreements
- Executive compensation plans
- Defined benefit plans
- Executive Carve-out
- Advanced retirement planning

Estate Planning

- Estate planning analysis
- Estate scenario flow charts
- Beneficiary review
- Dynasty Trust
- Generation Skipping Transfer
- CRATs, CRUTs, CLATs, CLUTs
- GRATs, GRUTs, QPRTs, IDITs
- ILITs, FLPs, SCINs
- Multi-generational transfers
- Post-mortem strategies
- Charitable giving
- Family legacy
- Liquidity and transfer
- Private Foundations
- Donor Advised Funds

Real Estate Planning

- Real estate planning
- Buy/sell scenario planning
- Cash flow analysis
- Investment real estate disposition scenario planning
- Real estate tax planning

Tax Planning

- Tax planning scenarios
- Stock options and restricted stock
- Tax management
- Tax loss harvesting
- Highly appreciated assets
- Investment tax management
- Estate and settlement costs
- Highly concentrated positions

Third party service providers

- Trust management and administration
- Custodial services
- Securities-based lending
- ACH and auto deposit
- Check writing
- Secure, encrypted electronic vault
- 401k Third party Administrators (TPA)

Inspired To Be Our Clients' Most Valued Asset™

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