MEET YOUR FINANCIAL PROFESSIONALS

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COASTAL WEALTH LOCATIONS

OFFICES IN:

- Augusta, GA
- Boca Raton, FL
- Clearwater, FL
- Coral Gables, FL
- Fort Lauderdale, FL
- Fort Myers, FL
- Hilton Head, SC
- Hollywood, FL
- Jacksonville, FL
- Metter, GA
- Miami, FL
- North Palm Beach, FL
- Ocala, FL
- Orange Park, FL
- Plantation, FL
- Port Richey, FL
- Sarasota, FL
- Savannah, GA
- Statesboro, GA
- Stuart, FL
- St. Simons Island, GA
- Tallahassee, FL
- Tampa, FL
- West Palm Beach, FL
- and many more...

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CA Insurance # and AR Insurance License #

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COASTAL WEALTH

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PERSONAL SOLUTIONS

PROTECTION

- Life Insurance
- Disability Income Insurance
- Long Term Care
- Medical | Health | Dental

RETIREMENT SERVICES

- 401(k)
- 403(b)
- 457(b)
- IRAs
- Roth IRA
- Defined Benefit Plans

INVESTMENT PRODUCTS

- Annuities (Fixed & Variable)
- Brokerage
    - Investments

ESTATE PLANNING

- Tax Efficiency Strategies
- Charitable Givings

BUSINESS SOLUTIONS

SUCCESSION

- Buy-sell protection
- Key person coverage
- Buy-out funding

QUALIFIED PLANS

- 401(k)
- Simple/SEP IRAs
- Defined Benefit Plans

NON-QUALIFIED PLANS

- Executive Bonus
- Deferred Compensation
- Split Dollar

GROUP BENEFITS

- Health Savings Account
- Dental Insurance
- Vision Insurance
- Life Insurance
- Long Term Care
- Disability Insurance

Some Health insurance products offered by unaffiliated insurers.

Our ultimate goal is to help clients make good financial decisions in line with their values by providing holistic, comprehensive financial services to individuals and businesses. We work together to help you reach your financial goals.

OUR SIX STEP PROCESS

OUR PROCESS

IDENTIFY your unique situation and goals

GATHER INFORMATION to help ensure financial freedom

ANALYZE your current portfolio to identify any gaps that may exist

PRESENT CUSTOM PLAN suggestions to fill after analysis so you can make informed decisions

IMPLEMENT strategies to ensure financial freedom

REVIEW strategies in place so you can make informed decisions & meet goals

Financial plan recommendations can be implemented with the advisor of your choosing. Implementation of specific products or services may result in commissions or fees outside of the financial planning fees.