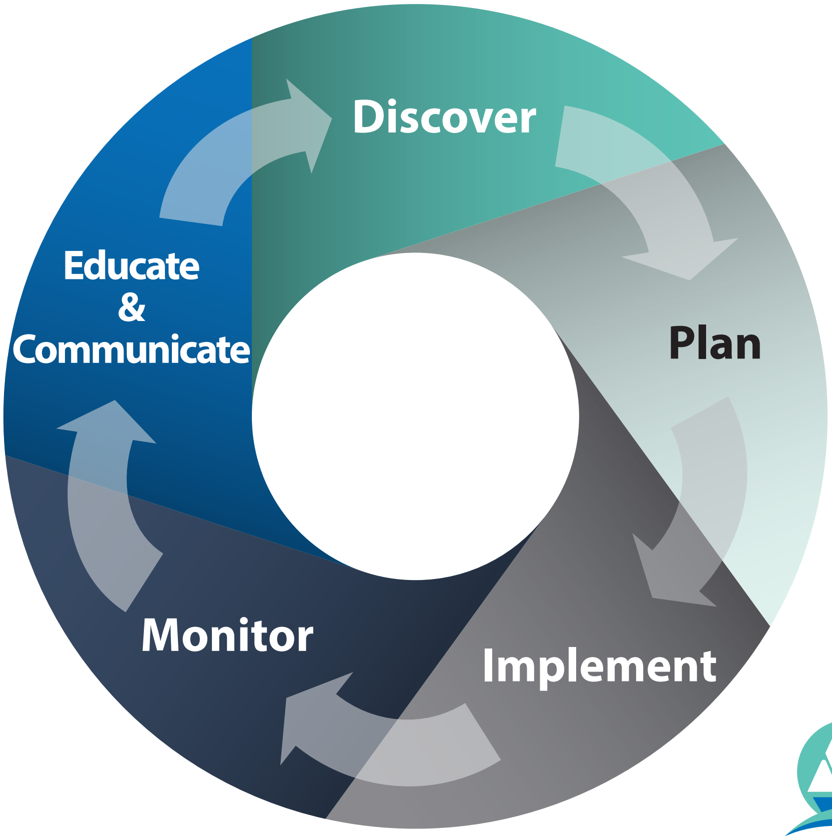
Small Business Owners Solutions

Simple Solutions for people who own and or run businesses.

We specialize in working with business owners. We are deeply committed to long-term relationships and have a great concern for the financial well-being of our clients. As a business owner, change comes fast and it's important to be prepared. We help you prepare for and manage that change while you manage your business.

A proven process that allows us to get to know you, implement a custom plan, and provide you with personalized, ongoing service.



Solutions

- Financial Planning
- Business Exit Planning
- Key Man Insurance
- Retirement Planning
- Employer Retirement Plan Guidance
- Education Funding Plans
- Tax-Sensitive Investing*
- Executive Compensation Arrangements
- Second-Opinion Services
- Access to Trust Services*
- Insurance Planning
- Access to Advanced Estate Planning*
- Inheritance and Financial Windfall Planning*
- 401k Guidance

TMB Financial Solutions
Financial Services • Insurance • Wealth Management

* We do not provide legal or tax advice. Consult your legal and/or tax advisor.

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Challenges

Below are some potential challenges you face as a small business owner:

- Retaining Top Employees
- Avoiding Taxation
- Business Valuation/Succession

Solutions

Below are solutions we offer to these challenges:

- Deferred Comp Plans, Retirement Plan Solutions
- Life Insurance Review, Investment Review
- Free Business Valuation and Succession Strategies designed for you.

FAQs

How do I obtain a second opinion review?
Please utilize my contact information below, and we will call to schedule an hour complimentary review.

What should I bring to our first meeting?
Our office will provide a list of things to bring. Generally speaking, all statements, insurance policies, legal documents relative to your business are necessary. This list will be provided a week prior to our first meeting.

What makes you different from other financial advisors?
We get to know our customers on a personal level. With our approach, we utilize key industry partners; we know the right questions to ask; and we care.

Your Advisors:

As Financial Advisors with many years of experience (John has been in the industry for 17 years and Bill for 13 years), we love partnering with the backbone of our community — small business owners. We believe in transparency, process, communication and great customer service.
Our process: Discover, Plan, Implement, Monitor, and always…Educate.

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