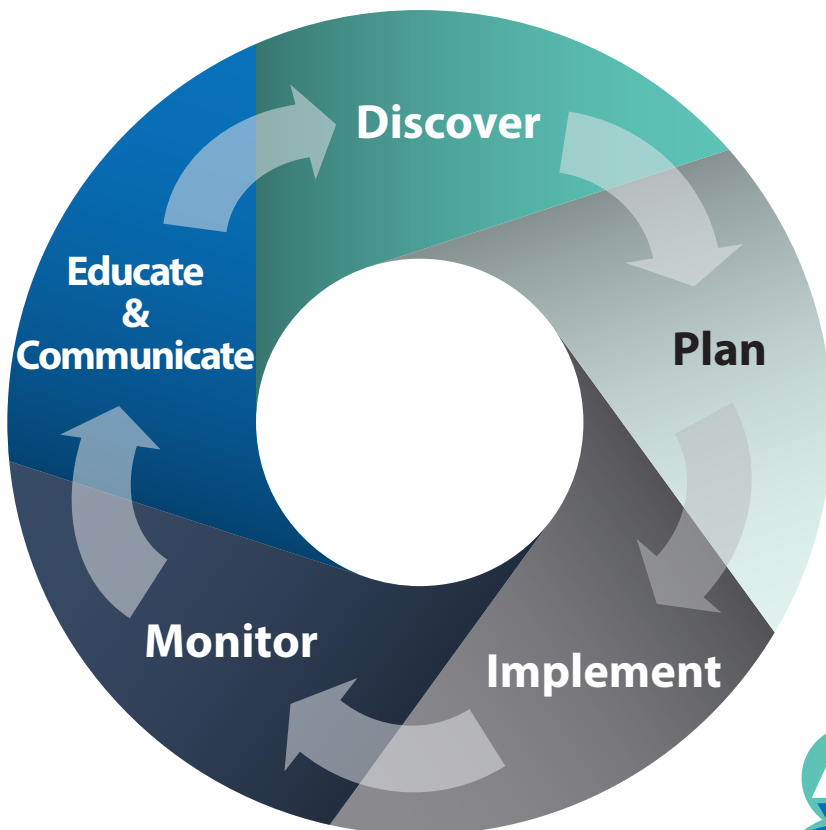


Small Business Owners' Solutions

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



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

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Small Business Owners' Solutions



TMB Financial Solutions
Financial Services + Insurance + Wealth Management

Challenges

We've listed some potential challenges you may face as a small business owner:

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

Solutions

Here are solutions we can offer to address these challenges:

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

FAQs

How do I obtain a second opinion review?

Please use my contact information below, and we will call to schedule a one 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 use 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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