

SERVICES

INVESTMENT MANAGEMENT

- Asset Allocation
- Evidence-Based
- CEFEX Certified for Fiduciary Excellence
- Globally Diversified Portfolios
- Structured Asset Class Indexing
- Low-Cost and Tax-Efficient
- Risk/Return Analysis
- Concentrated Position Evaluation
- Stock Option Analysis

TRUST ADMINISTRATION Carlson Trust*

- Corporate Trust Services
- Charitable Trust Administration
- Documentation Compliance
- Distribution Management
- Fiduciary Tax Preparation
- Irrevocable Trusts

* A Trust Representative-Office
of National Advisors Trust

ESTATE PLANNING

- Estate Plan Design
- Disposition of Assets
- Estate Tax Evaluation
- Revocable Living Trust/Will Analysis
- Irrevocable Trusts
- Family Limited Partnerships
- Credit Shelter Trusts
- Family Gifting Strategies
- Incapacity Planning
- Wealth Transfer
- Estate Administration

PHILANTHROPIC PLANNING

- Directing Social Capital
- Strategic Gifting Strategies
- Donor Advised Funds
- Charitable Trusts
- Donor Legacies

TAX PLANNING

- Tax Saving Techniques
- IRA Distribution Planning
- Transaction Strategies
- Tax Forecasting
- Transaction Analysis
- Alternative Minimum Tax Planning

CCM Tax & Trust Administration

- Tax Return Preparation
- IRS Representation

RETIREMENT PLANNING

- Retirement Feasibility Analysis
- Cash Flow Modeling
- Required Minimum Distributions
- Designated Beneficiary Options
- Pension Maximization

INSURANCE PLANNING

ViaForte

- Life, Disability and Long Term Care Insurance
- Wealth Transfer Strategies
- Income Replacement Needs Analysis
- Long Term Care Planning
- Business Succession Planning
- Policy Implementation and Administration

CLIENT

