



Maximize the success of your business

As your business grows, you may find that you have less time to manage your wealth – potentially missing opportunities to maximize personal and professional assets, and minimize taxes.

Investment Advisor Barb March-Burwell helps small business owners, medical professionals, and farmers:

- Clarify goals for your personal and professional assets
- Manage all aspects of your financial issues, so you can focus on continuing the success of your business
- Build tax-efficient strategies that impact your personal and business taxes
- Structure your business and partnerships to ensure legal and financial continuity in case of accidents or death
- Turn their success into reliable retirement income
- for a smooth succession to family members or partners
- Create tax-efficient estate plans so you can pass on more wealth and less taxes

- Incorporate strategies to ensure your family doesn't have to compromise their lifestyle in case of any accidents

BUILD FINANCIAL SECURITY INTO YOUR BUSINESS

No matter what your business and personal goals are, Barb can help with all aspects of your wealth management: investments, risk management, tax planning, business succession planning, Will and estate consultations and retirement planning.

Find out more. Contact Barb for a complimentary initial consultation.

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Professional Wealth Management Since 1901

