FSA
WEALTH MANAGEMENT

# FSA Wealth Management:
# more than wealth management

**We know that managing wealth goes beyond the numbers.**

Whether planning for the next generation, managing a growing business, or looking ahead to major life changes, complex challenges call for thoughtful solutions that tie your financial goals together.

## ALWAYS INQUISITIVE

Whether at our first meeting or after years of working together, we ask the right questions to get the full picture of our client's financial life. We then put our insights to work so we can make decisions together with confidence.

## ALWAYS INDEPENDENT

We value our independence, and we embrace our role as fiduciaries. We act only in the best interest of our clients, with a deep commitment to their goals and with no ties to any financial products.

## ALWAYS INVESTED

Our rare blend of expertise allows us to put the best strategies into play for each unique situation.

- *Investment management: growing your assets*
- *Risk management: protecting your wealth*
- *Business planning: helping your business and personal wealth work together*
- *Retirement planning: targeting tax-smart distributions*
- *Taxation: minimizing your tax burden*
- *Estate planning: preserving and transferring your legacy*
- *Charitable planning: formalizing your philanthropy*