

"Putting an extra player on your financial planning team!"

Owner

Matt Smith | Steve Smith Owner

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Services Financial Professional Retirement **Taxes Investments** Insurance **Planning** Referrals Comprehensive Review of **Tax Loss Review of Existing** Income Lab **CPA Fact Finder Portfolio** Harvesting Strategies/Policies **Accumulation and Human Life Value Potential ROTH** Distribution **Asset Allocation** eMoney **Attorney** Calculation Conversions **Planning** Active **Retirement Plans** Physical and Medicare (IRA, ROTH IRA, Management of **Needs Analysis** Cost Basis Review Virtual Meetings **Specialist** Investments 401k,etc) **Matthew Smith** Pre-Medicare **Social Security** Implementing CFS, AIF **Ongoing Review Health Insurance** and Medicare **Strategies** Started 2005 Specialist Stephen G Smith Morningstar, Withdrawal/Income Nitrogen, Zack's, and MBA, CLU, ChFC **Banking Strategies Schwab investment** Started 1982 tools **Whitney Turner Cash Flow Operations Manager** Securities and Advisory Services offered through Harbour Investments, Inc. Member FINRA/SIPC. Management Started 2006 **Software**