

# W/A

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## WEALTH ADVOCACY



### *Leading Your Business to Excellence*

At Wealth Advocacy our specialized team of professionals help you implement sound and efficient financial and management strategies. We review such areas as cash flow, financial oversight, leadership practices, enterprise value, and risk management.

An integrated strategic plan is best achieved by considering all facets of your financial picture. Our mission is to create an optimal plan that meets your goals.

We are independent fiduciaries, with a clear hourly or per project pay structure. Our incentive is therefore based solely on your agenda, with no hidden commissions or fees.

We will work with other key players such as your accountant, attorney, insurance agent, benefits provider, and anyone else that can help achieve the best result.



### *Our Services*

- Income and Cash Flow Analysis
- Risk Analysis and Mitigation
- Benefits and Investment Analysis
- Real Estate and Closely Held Asset Review
- Succession and Legacy Planning
- Strategic Business Analysis
- Asset Review and Protection
- Ongoing Monitoring & Consultation

### *As Your Advocates*

