

HARRIS FINANCIAL *Consulting* PLLC

CORPORATE INVESTMENT ACCOUNTS

- Asset-based pricing
- Corporate Investment Policy-focused portfolios
- Dedicated Fiduciary Advisor
- Discretionary accounts managed by dedicated money managers
- Direct ownership of underlying portfolio securities
- Expanded range of assets and strategies

Retirement Plans

- Employer-Sponsored Plans
- Defined Contribution & Defined Benefit Plans
- Self-Employed Plans
- Non-Sponsored Plans

Corporate Accounts

- \$500,000 account minimum recommended
- Holding Companies
- Industry, Sector, Global, and International Portfolios
- Strategic Growth & Wealth Management Portfolios

Foundations, Trusts & Endowments

- \$250,000 account minimum recommended
- Public Charities
- Private Foundations
- Corporate and Family Trusts & Endowments
- Donor-Advised Funds

WWW.HARRISFIN.COM

Change Your Legacy.

Advisor-managed retail accounts for business owners also available, beginning at \$50,000.

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