



Great outcomes.
Done well.

What We Do For You

The Evan Guido Group

Life Management

- Net Worth Analysis
- Income Needs Analysis
- Automatic Required Minimum Distribution
- Saving Goals
- eBill Payments
- Online Access
- Cash Management
 - Setup Monthly Electronic Transfer
 - Direct Deposit
 - Platinum Mastercard®
 - 24/7 Fraud Protection
 - Baird pays Foreign Transaction Fees
 - ATM Access Through Mastercard®
 - Rebates for ATM Transaction Fees
 - Free Checks
 - Award Points

Estate Planning

- Review
 - Wills
 - Trusts
 - Powers of Attorney
- Business Succession Plan
- Proper Account Trusts
- Referrals To Outside Professionals

Philanthropy

- Review
 - Donor Advised Fund
 - Charitable Remainder Trust
 - Family Foundation
 - Direct Donation
- Referrals To Outside Professionals

Taxes

- Manage Turnover
- Update Cost Basis
- Tax Overlay Management
- Internal/External Assets
- Referrals To Outside Professional

Risk Management

- Review
 - Life Insurance
 - Long-Term Care Insurance
 - Disability & Business Overhead
- Social Security Benefit Analysis
- Referrals To Outside Professionals

Liability Management

- Review
 - Home Loan
 - Car Loan
 - Credit Card Loan
 - Business Loan
 - Long-Term Care Insurance
 - Disability
- Debt Repayment Plans

Asset Management

- Comprehensive Financial Plan
 - Cash Flow Projection
 - Annual Monitoring of Plan
- Alternatives
 - Hedge Funds
 - Managed Futures
 - Private Equity
- Passive v. Active Manager Selection
- External Retirement Plan Recommendations
- Income Planning
- Asset Allocation Plan
- Rebalancing of Asset Allocation
- ETF's, Mutual Funds, and/or Separately Managed Accounts depending on client
- College Planning 1529 Plans

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