



*These are services that are review and analyze.

In addition to our services listed above, we also:

- » Coordinate with other advisors such as your attorneys and accountants.
- » Hold regular meetings and ensure that all planning is well coordinated and implemented.
- » Maintain copies of documents such as insurance policies, estate planning and legal documents, and tax returns.
- » Coordinate family legacy meetings

For a comprehensive review of your personal situation, always consult with a tax or legal advisor. 00726824-R-0520

Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Carson Partners, a division of CWM, LLC, is a nationwide partnership of advisors.

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