



Planning today ~ for your financial tomorrows.

716-862-0500

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Family and Protection Component

- Will/Health Care Proxy/Power of Attorney
- Life Insurance
- Disability Insurance
- Auto/Homeowner and Umbrella Insurance
- Health Insurance
- Long Term Care Insurance

Liquidity/ Safe Accumulation Component

- Saving Accounts
- Checking Accounts
- Money Markets
- Credit Unions
- Government Bonds
- Municipal Bonds

Risk Asset Accumulation Component

- Mutual Funds
- Collectables
- Stocks
- Real Estate
- Options
- Tax Shelters

Retirement Component

- Annuities
- 401k Plans
- Simple IRAs, SEPS etc.
- Defined Benefit Plans
- Defined Contribution Plans
- IRAs/ Roth, Standard/ Education

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