Executive/Financial Planning Services

Freed Maxick & Battaglia has teamed with Sagemark Consulting to provide Executive Financial Planning Services. Sagemark Consulting is the division of Lincoln Financial Group (a Fortune 500 company) that specializes in comprehensive financial services to executives, business owners and professionals.

Executive planning provides a complete view of your financial condition and identifies areas in need of attention. Decisions are made in an effective manner, since each component - your estate, investments, retirement and business - is analyzed. The resulting plan is comprehensive, objective and specifically tailored to meet your needs.

The process begins with a holistic audit of your estate, investment, and business situation to analyze every component of your finances. This leads to the development of a comprehensive financial model of your current situation, which includes cash flows, income tax and estate distribution projections. This process is designed to identify gaps between current planning and your objectives and risk tolerance. Alternative strategies are explored resulting in solutions that are the best fit for your financial situation. These customized recommendations form the basis of your financial plan.

Estate Planning Proper estate planning helps you create and conserve assets during life, and provide an orderly distribution of assets at your death designed to minimize estate taxes and help you meet your objectives.

Investment Planning Our investment management approach is based upon the principles that asset allocation is the foundation of portfolio management and that no single money management firm can be all things to all people. Our most important role is to be an objective advocate. Portfolio design and management is enhanced by cutting edge technology.

Retirement Planning Only 2% of Americans reach financial independence in their retirement years. Ongoing coordination and planning improves your chances for success.

Business Owner Planning Failure to design a proper succession plan can result in a business' inability to survive after the death, departure, or disability of an owner.

Financial planning is an ongoing process. Your needs and the world around you are constantly changing. To this end, we meet with you on an ongoing basis to review your financial plans and discuss new ideas.

For more information, contact:

Henry Koziol, CPA
henry.koziol@freedmaxick.com
tel: 716.847.2651