Craig Moore

Financial Advisor

- Primary point of contact for clients and their families
- Coordinates and implements client's overall financial strategy
- Coordinates and manages the relationship with CPA and attorney (where applicable)

Tax Strategies

Utilizing a qualified CPA

- Tax returns
- Tax projects
- Tax implications of financial decisions

Legal Strategies

Utilizing a qualified attorney

- Wills
- Trusts
- Ownership
- Beneficiaries
- Power of attorney (POA)

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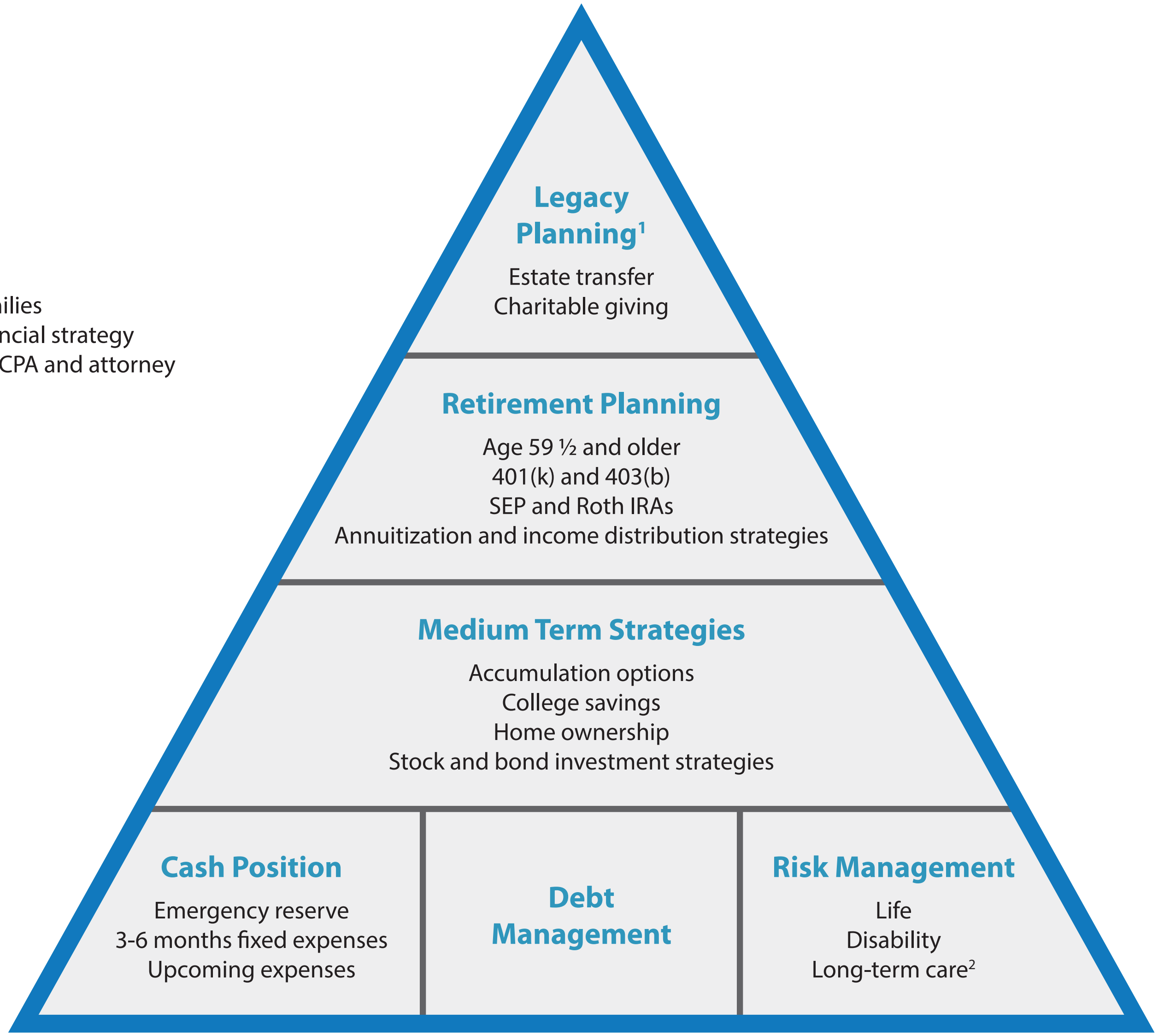

[1]Often coordinating the services of the CPA and the attorney on the legacy planning process | [2]Independent with the capacity to utilize a variety of insurance companies