

The Essential Elements of Wealth

It's your relationship. On your terms. So, we customize an experience that delivers what you need when you need it. Advice integrated across a range of topics we've defined as the Essential Elements of Wealth. While these elements may not reflect all of your personal needs, they're a starting point to help uncover priorities, identify interdependencies, and begin crafting your plan. Let's work together to help create your most confident future.



Planning

Goals-based financial planning including:

- Education planning¹
- Tax considerations
- Retirement accumulation
- Asset accumulation and savings plans
- Retirement distribution
- Business planning considerations



Banking

- Deposit solutions
- Credit card
- Mortgages
- Home equity lines of credit
- Personal secured and unsecured lines and loans
- Boat/marine lending
- Commercial real estate financing
- Business loans



Risk

- Risk assessment
- Asset protection strategies
- Life, long-term care, and disability insurance²
- Excess liability coverage assessment³
- Income protection strategies
- Healthcare expense considerations



Investments

- Market strategy insights and commentary
- Strategic and tactical asset allocation guidance
- Customized portfolio management
- Investment risk management and income enhancement strategies
- Full-service brokerage offering and market-linked investments provided by Truist Investment Services, Inc.



Estate

- Trust plan implementation
- Estate administration and settlement
- Estate, gift, and generation-skipping tax planning
- Wealth transfer planning
- Ongoing trust administration and management



Learning

- Education services: whitepapers, articles, audio, and videos
- Educational events

Investment and Insurance Products: Are not FDIC or any other Government Agency Insured
• Are not Bank Guaranteed • May Lose Value

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¹ Offered by Truist Investment Services, Inc.

² Offered by Truist Life Insurance Services

³ Offered by McGriff Insurance Services, Inc.

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