



## ✓ INSURANCE PROTECTION

The most important part of preparing for the future is protecting it. As a MFGIA agent, I can help you prepare for uncertainty. Whether you outlive your retirement, pass away unexpectedly or become disabled, there are products that can help protect the life you've built for you and your loved ones.

## ✓ RETIREMENT STRATEGIES

The key to a successful retirement is one that doesn't require you to compromise your lifestyle or wonder if and when your nest egg will run out. As a MFGIA agent, I can provide a variety of options to help you prepare for your leisure years confidently without having to sacrifice your quality of life.

## ✓ BUSINESS STRATEGY

Small business owners need financial and insurance options for themselves and their employees, and they need to ensure the future security of their businesses. I can help structure strategies for employees and owners to help ensure if- or when- something happens, those who own and run the business are protected.

## ✓ ESTATE PLANNING

We help you keep more of what you've earned. Working with your tax and legal professionals, we'll develop a strategy to help preserve your legacy and avoid it decreasing due to federal and, in the United States, estate taxes:

- Charitable Strategies & Trusts
- Life Insurance Trusts
- Wealth Replacement Trusts

## ✓ FINANCIAL SERVICES

Maximus Financial Group's independent agents work with you to provide a clear financial strategy to go from where you are to where you want to be through:

- Financial Needs Analysis
- Financial Goal Setting
- Strategies to Pursue Your Goals

## ✓ COLLEGE PLANNING

Whether preparing to send your first or fifth child to college/university, we can help you begin saving now with:

- Preparing for college



## CONTACT US

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