



# Top Financial Advisors in Chicago



# GOLDEN TREE WEALTH PARTNERS

We are your wealth partners

## PREPARING FOR LIFE



### Financial Position

A review of your financial position provides a better understanding of where you are right now. This financial picture will address your balance sheet, cash flow and debt management and if savings are balanced and appropriate for meeting your goals.

## MANAGING YOUR BUSINESS



### TAX MANAGEMENT

When applied appropriately in conjunction with a financial strategy, tax strategies can help reduce the impact of taxes on investment returns and income.

## GROWING YOUR BUSINESS



### WEALTH ACCUMULATION

Design a strategy to help you invest your assets in order to meet your financial goals by taking into



consideration your personal situation and tolerance for risk.

## EXITING YOUR BUSINESS

### ESTATE PLANNING



Proper estate planning can help you to pass on more of your wealth to your family and charities than to taxes. It can take into consideration the special concerns of young families with minor children, business owners who need to address succession planning.

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