PagnatoKarp
Transparent Family Wealth Advisors

PLANNING EXPERIENCE

Fusing our expertise into your **customized plan** for your unique needs.

Custom Financial Planning

Unique planning solutions designed to move you towards your goals:

- In-depth assessment coordinated by a credentialed financial planner
- Fusion with Legal & Estate Planning, Tax and Family Governance plans
- On-demand scenario analysis to support ongoing decision making

Expertise designing solutions for the ultra high-net-worth:

- Entrepreneurs
- Business Owners
- Founders and CEOs
- Wealth Creators
- Multigenerational Families

Advanced technology to monitor your progress

Specific Strategies

Breakthrough solutions based on discovery and success planning to minimize your dangers, maximize opportunities ahead, and take advantage of your strengths:

- Quantified financial independence
- Tax minimization strategies
- Portfolio implementation proposal
- Lifestyle funding using diversified cash flow distribution strategies
- Liability management
- Executive compensation and stock option planning
- Long-term wealth accumulation and transfer planning
- Succession and Estate Planning solutions
- Charitable planning

Asset Protection Planning

Fiduciary insurance assessment:

- Income replacement
- Estate liquidity
- Liability and property

Introduction to brokers specializing in meeting the needs of the ultra high-net-worth:

- Life & Disability
- Buy-sell planning and funding
- Property and casualty
- Health

Beneficiary and ownership review

pagnatokarp.com 703-468-2700
11951 Freedom Drive, Suite 1260, Reston, VA 20190

Disclosures

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