PWR ADVISORS | PRIVATE WEALTH RESOURCE®

EXPERIENCE
TEAMWORK
OBJECTIVITY

WHAT WE OFFER

Our knowledge, resources, and relationships with some of the best investment management professionals and proven financial service providers in the industry allow Private Wealth Resource Advisors the opportunity to offer our clients and their advisors the highest quality financial products and services available.

BUSINESS NEEDS

TAX-QUALIFIED RETIREMENT PLANS

- Defined Benefit Plans
- 401(k) / Profit Sharing
  - Participant Directed
  - Trustee Directed
  - Balance Forward
- 3(38) Money Manager Coordination
- 3-16 TPA Support Resources
- (SEP) / SIMPLE Plans

EXECUTIVE & EMPLOYEE BENEFIT PLANNING

- Deferred Compensation
- Section 162 Executive Bonus Arrangements
- COLI
- Selective Executive Retirement Plans
- Split Dollar Life Insurance
- Group, Life, Health Insurance & Disability Income Insurance

BUSINESS CONTINUATION PLANNING

- Buy-Sell Arrangement Funding
- Business Succession Plans
- Key Person Life Insurance

PERSONAL NEEDS

WEALTH ACCUMULATION STRATEGIES

- Advisory (Managed) Accounts
  - Private Asset Management
  - SMA's/UMA's
  - Alternative Investments
  - Corporate Executive Services
  - Tax-Advantaged Securities
  - Donor-Advised Funds
- Endowments/Foundation
  - Asset Management
- Retirement Planning
- Mutual Funds
- Traditional and Roth IRAs
- Education Funding
- Fixed/Variable Annuities

FAMILY PROTECTION

- Life Insurance/Variable Life Insurance
- Disability Income Insurance Protection
- Estate Planning
- Charitable Planning and Tax Strategies

www.PWRadvisors.com