WEALTH MANAGEMENT FOR ATTORNEYS

FREEING YOU TO FOCUS ON THE REST OF YOUR LIFE

As an attorney, your time is literally money, and you may not want to spend what free time you do have on your finances. Yet your financial picture may be complex, and you wonder whether you can be making better decisions. Your experiences may have shown you how crucial it may be to smooth out your income over time, and you need to know that you are ready to retire, whether it comes on time or as a forced early retirement.

For over two decades, SJS has provided wealth management for attorneys. Each of our advisors will lend their expertise in designing a financial plan and investment portfolio to help protect your wealth, smooth out fluctuating income, reduce your taxes, optimize your law firm benefits, and achieve your lifestyle goals. By providing proactive, ongoing financial planning, we strive to help you feel confident that your career and family are protected and long-term goals such as retirement are on track.

COMMON QUESTIONS

- Who understands me?
- How could I smooth out my income over time?
- What can retirement look like for my spouse and me?
- What can I do to reduce my taxes?
- Will selling my partnership adequately fund retirement?
- What can I do to protect my family in pandemics and other crises?
- How can I pass on my wealth without taxes eating up the inheritance?

SJS Investment Services

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6711 Monroe Street; Building IV; Suite A—Sylvania, OH 43560
SJSinvest.com

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HOW WE HELP

We provide expertise for the unique challenges and opportunities that attorneys face. We can help you:

- Balance your spending for today vs. your saving for tomorrow
- Manage risk to your wealth, career, family, and retirement
- Diversify wealth and smooth out income variability
- Structure your law firm exit to help maximize retirement income
- Plan for the transfer of your estate so that taxes are minimized

WHAT YOU RECEIVE

- Client-first philosophy that "You come first. All the time. Every time." It isn't just a slogan. It's how we live our lives. It's how we were raised. Our team provides major money center investment experience to you no matter where you live, where you work, or when you need it.
- As a Registered Investment Advisor (RIA), SJS is duty-bound to serve as a fiduciary, putting your interest first.
- The support of a team of professionals, with each team member applying their strengths to your situation.
- MarketPlus Investing®—our proprietary investment process, which incorporates academic advances in portfolio design with SJS' 25-plus years of investment experience to help you achieve your goals through personalized investment portfolios built with low costs and tax efficiency in mind.
- A secure and personal MySJS online dashboard with 24/7 access for tracking goals, account balances, investment progress, financial statements, and tax documents.

SERVICES

- Financial planning
- Lifestyle and retirement goals
- Investment management
- Exit and succession planning
- Compensation and benefits optimization
- Tax and estate coordination
- Cash flow management
- Risk management

How Can We Help You?

Contact us to discuss your situation.

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