WEALTH MANAGEMENT FOR EXECUTIVES

WE TEND TO THE DETAILS SO YOU DON'T HAVE TO

You have limited time as an executive. Between professional and personal obligations, you lack the time and perhaps even the desire to manage your complicated financial picture. How do you leverage your executive compensation and benefits for your long-term goals? How can you protect and build on your wealth, and how do you make sure you are ready for life after career? You want a financial advisor who can help answer these questions and leave you assured that you are on track for your goals.

For over two decades, SJS has helped simplify and organize the complex wealth pictures of executives. Each of our advisors will lend their expertise in all areas of your financial life, such as compensation and benefits, investments, taxes, and risk management. We craft financial strategies to help achieve your goals now and in the future. Our mission is to provide ongoing support to keep you on course and leave you free to focus on leading your company.

COMMON QUESTIONS

- Who understands me?
- How do I use my compensation and benefits toward my goals?
- Can I afford to retire early?
- What is my lifestyle going to look like in retirement?
- What can I do to reduce my tax burden?
- How do I pass on a legacy without it being eroded by taxes?

HOW WE HELP

We provide financial expertise to help you preserve and grow your wealth. We can help you:

- Manage your executive compensation and benefits
- Plan for the life chapter that comes after career
- Manage your cash flow and reduce your long-term tax outlook
- Assess your risk management and insurance needs through a licensed insurance agent, particularly life insurance coverage
- Work with other professionals to create an estate plan to help minimize the taxes your heirs pay
- With "what's next" in your life

SERVICES

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

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.

How Can We Help You?

Contact us to discuss your situation.

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