





*Building Wealth,
Wisdom &
Well-Being*



Give life to your dreams



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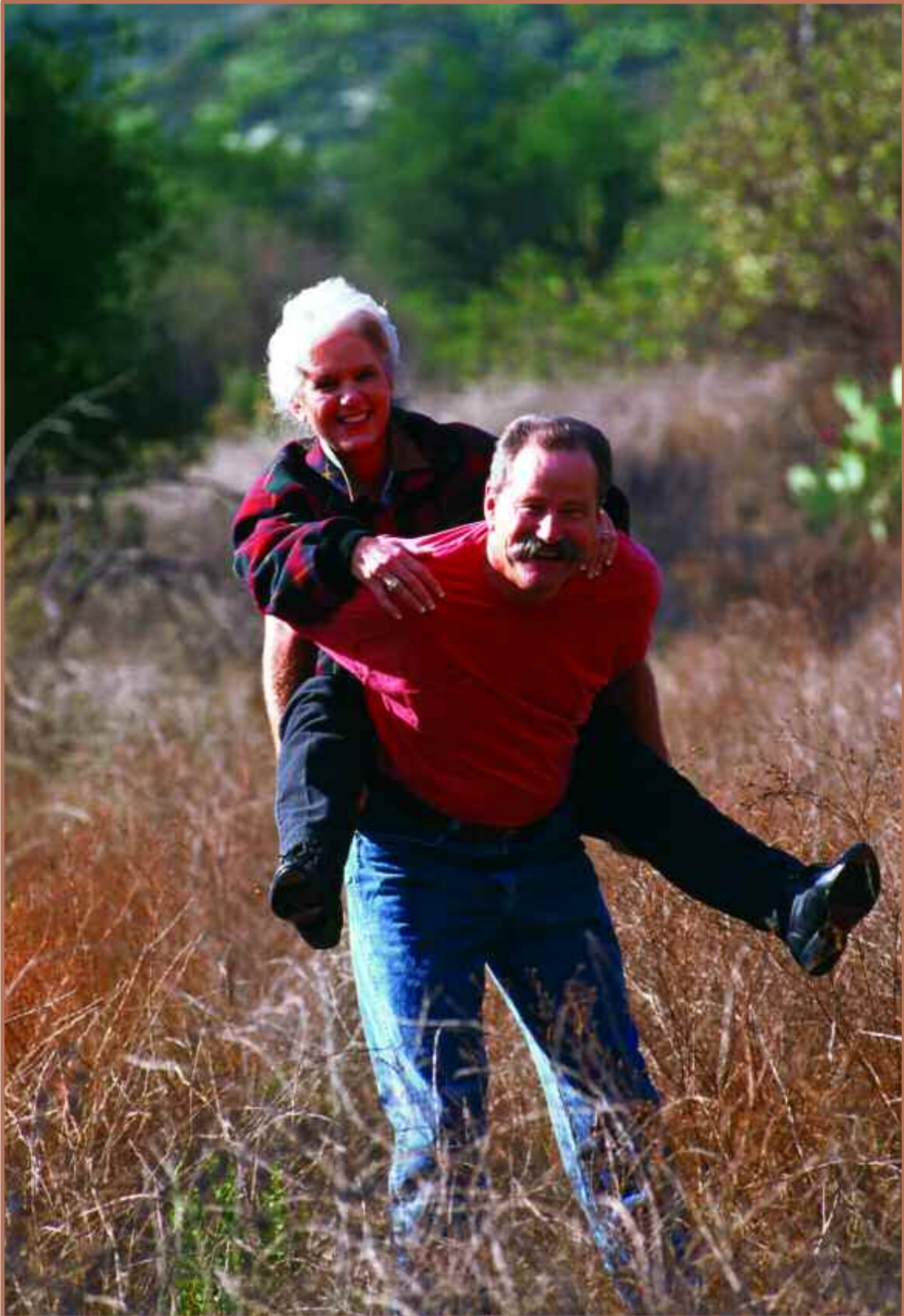
*Go confidently in the
direction of your dreams.
Live the life you've imagined.*

~Henry David Thoreau

At Asset Preservation Strategies, Inc., we specialize in helping people realize their financial dreams. And we encourage you to **dream big**.

Our mission is to help you crystallize your vision and develop a wealth management plan to ensure that your dreams and goals become a reality. We bring a unique combination of financial expertise, planning experience and the ability to listen — really listen — and give life to your dreams.





*Dreams come true; without
that possibility, nature would
not incite us to have them.*

~John Updike

When you become a client, we'll give you our all. Whether you need help managing your money for the greatest good now ... or would like our assistance unearthing your vision of the legacy you want to create ... we're dedicated to providing the insights and expertise you need to flourish financially and accomplish your heart's core desires.

You have the inherent wisdom to know what you want and how to achieve it. Our role is to help you bring that wisdom to light, through our professional expertise, our integrity and our commitment to your best interests.

Some firms offer "comprehensive" wealth management. We take a slightly different approach. What we engage in is "collaborative" wealth management – with a personal touch.

People like you, with significant net worth and income, face daunting challenges from the nation's income and estate tax systems. Growing your estate throughout your lifetime and passing it to your desired beneficiaries in a manner of your choosing, all with a minimum of taxation and administrative headaches, requires advanced planning and regular maintenance.

With our many years of experience in assisting families, we are here for you, your children and grandchildren as needed. Your estate can be designed to benefit you and multiple generations of your descendants as well as meet your philanthropic goals if adequately planned and professionally designed.

**We are committed to building your wealth,
wisdom and well-being.**

...in dreams begins responsibility.

~William Butler Yeats



We leverage the strengths of our collaborative partners and professional entities in the design, implementation and maintenance of your financial plans and wealth designs.

When we work with you, we will:

- Provide an Investment Policy Statement that quantifies and describes the parameters, goals and objectives of your investment portfolio
- Regularly evaluate and maintain your life, disability, medical and long term care insurance coverage and ensure that the issuing companies are performing as promised
- Evaluate and plan your income tax liability, taking advantage of every deduction and strategy available and appropriate for your situation
- Ensure that your retirement income is on target and adequately adjusts for inflation throughout your life expectancy
- Keep your estate plan current and utilize strategies to ensure more for you and your family than for the IRS

We embrace new information, technologies, resources and processes in an effort to excel in our service to you. However, no matter how much systems and technology may improve our business and our lives, we are dedicated to keeping warm human connections alive.





*“The future belongs to those who believe
in the beauty of their dreams.”*
-Eleanor Roosevelt



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 Asset Preservation
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Collaborative Wealth Management

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