LEWIS FINANCIAL

COMPREHENSIVE WEALTH MANAGEMENT

- Retirement Planning Analysis
- Estate Planning
- Personalized Income Planning
- Tax Planning/Review
- Education Funding Strategies
- Charitable Planning
- Trust Integration
- Wealth Conservation

All SERVICES PERSONALIZED BASED ON OUR CLIENT'S NEEDS

CORE INVESTMENT MANAGEMENT

Assets Allocation	Assets Allocation
Portfolio Re-Balancing	Portfolio Re-Balancing
Risk Tolerance Evaluation	Risk Tolerance Evaluation
Review Goal and Objectives	Review Goal and Objectives
Net-Worth Analysis	Net-Worth Analysis
Cash Flow Analysis	Cash Flow Analysis
Tax and Cost basis Reporting	Tax and Cost basis Reporting
Account Aggregation	Account Aggregation
Documnt Vaulting	Documnt Vaulting