



## WHAT WE DO

At Strategic Wealth Design, we use a Comprehensive Financial Planning process to help you with:

FINANCIAL ORGANIZATION

INSURANCE STRATEGIES

TAX STRATEGIES

INVESTMENT STRATEGIES

SAVING, INVESTING AND GROWING WEALTH

## WHO WE ARE

Strategic Wealth Design is a financial services firm located in Las Vegas, NV with clients in several cities across the United States. We were founded on one purpose, to enrich the lives of people we touch by helping them create financial freedom and security.

## WHO WE SERVE

 Physicians

 Dentists

 Architects

 Attorneys

 Business Owners

 Engineers

## PERSONAL STRATEGIES

- Financial Planning
- Financial Organization
- Investment Management
- Tax Strategies
- Insurance Strategies
- Debt Elimination
- College Funding
- Charitable Giving
- Estate Planning
- Retirement Income Planning

## BUSINESS OWNER STRATEGIES

- Business Succession Planning
- Insurance Strategies
- Tax Strategies
- 401(k)s and Pension Plan Strategies
- Employee Retention Strategies
- Corporate Financial Wellness
- Retirement Income Planning

## PRODUCTS & SERVICES

- Financial Planning
- Wealth Management
- 401(k)s and Pension Plans
- General Securities and Bonds
- Fixed Annuities
- 529 Plans
- Mutual Funds
- Life Insurance
- Disability Insurance
- Long Term Care Insurance