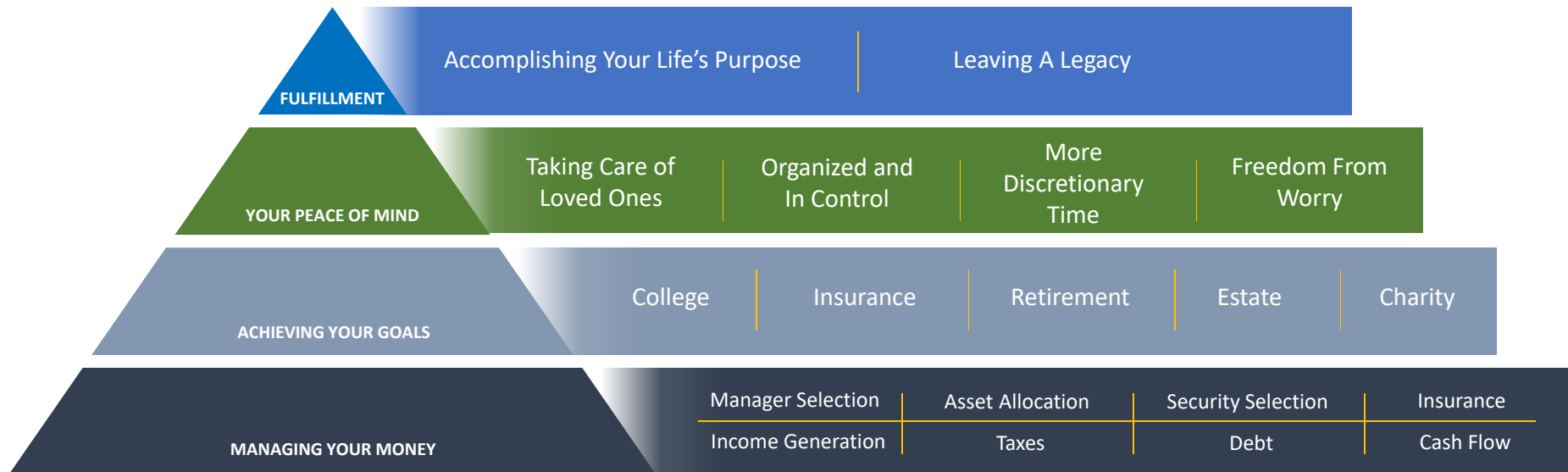


On-Going Financial Advisory Services

To help you achieve what is really important in your life, your values, your vision



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Financial Planning	Investment Management	Transition Management	Global Financial Planning (when applicable)
A thorough discovery of family financial history, wants, and needs	A clear, concise, understandable process aligned to your goals	Your guide and thinking partner to new realities as your life progresses	Identifying and managing the complexities of life in new locales
<ul style="list-style-type: none"> • Cash Flow Management • Tax Planning • Retirement/Independence Planning • College Planning • Major Purchase • Risk Management/Insurances • Estate Planning • Charitable Planning • Investment Planning 	<ul style="list-style-type: none"> • Investing, on your behalf • Asset Allocation • Regular Rebalancing • Tax Management • Monitoring • Security and Fund Research • Company Stock Options evaluation 	<ul style="list-style-type: none"> • Major life events require new approaches • Your partner through the four stages of transition • Keep you safe in turbulent times • Give you time to make prudent financial decisions • Explore possibilities and alternatives • Help you discover the value in change 	<ul style="list-style-type: none"> • Primary focus on Netherlands, Australia, UK and Spain • Immigration and Emigration Planning • All facets of Financial Planning focused on cross-border • Currency Risk Management • Working with tax, estate, and immigration professionals • Cross-border Pension Planning • Cross-border investments • Effective cross-border insurance