



Meagher Financial Services, Inc.

Wealth Management

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## Our Products and Services

### Investments

Mutual Funds  
Variable Annuities  
Alternative Investments  
Bonds  
Common Stock  
Brokerage Accounts

### Financial Planning

Second Career Planning  
Social Security Planning  
Cash Flow Analysis  
Tax Planning  
Intergenerational Planning  
Wealth Management  
Home and Auto Loans  
Real Estate & Personal Loans  
Secured/Unsecured Loans

### Insurance

Life Insurance  
Long Term Care  
Disability Income  
Fixed Annuities  
Indexed Annuities  
Individual Health  
Group Health  
Medicare Supplement

### Retirement Plans

Traditional IRA  
Roth IRA  
SEP IRA  
Simple IRA  
401k Plans  
403b Plans  
Money Purchase Plans  
Profit Sharing Plans

### Goal Based Planning

Retirement Planning  
Dream Vacation Planning  
Bucket List Planning  
College Planning (529)  
Charitable Giving  
Life & Goal Planning  
Estate Planning

### Trusts

Dynasty Trust  
Special Needs Trust  
Asset Protection Trust  
Charitable Trust  
Life Insurance Trust  
Testamentary Trust



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"A Multi-Generation Firm Servicing  
Multi-Generation Families"



[www.meagherfinancialservices.com](http://www.meagherfinancialservices.com)

## Money Decisions May Arise...

### New Money Decisions

- Tax Refund
- Inheritance
- Severance Package
- Legal Settlement
- Lottery Winning
- Monetary Prize
- Sale of Real Estate
- Sale of Business

### Portfolio Decisions

- CD Maturing
- Excess Money in Cash
- Bonds Maturing
- Sale of Investments
- Sale of Limited Partnership
- Sale of Non-Traded REIT
- Sale of DPP
- 401k Rollover
- Loan Repayment

### Discussion Points

- New Job
- Retirement
- Wedding
- New Child/Grandchild
- Divorce
- Relocating
- Buying a Home
- Starting a Business
- Becoming a Caregiver
- Family Issues
- Legal Concerns
- Loved One's Mental Decline