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FINANCIAL PLANNING

WHAT IS IT?

LEARN WHAT IT IS AND HOW IT BENEFITS YOU

MAVERICK CHURCHILL
WEALTH ADVISOR

READ NOW

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AT INDEPENDENT PLAN WE HAVE A SPECIAL RELATIONSHIP WITH BUSINESS AND AGRICULTURE. WE UNDERSTAND HOW THE INDUSTRY WORKS AND HAVE CREATED A PROCESS WITH OUTSTANDING RESULTS FOR OUR CLIENTS. HERE WITH YOU AND FOR YOU!

MAVERICK CHURCHILL
WEALTH ADVISOR

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#1 ESTATE PLANNING STRATEGIES

ASK FOR OUR ESTATE PLANNING GUIDE

- CONSERVE ASSETS
- MINIMIZE DEATH TAX AND SETTLEMENT COSTS
- ENSURE CASH IS AVAILABLE
- ORDERLY DISTRIBUTION

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SUCCESSION PLANNING

THE PROCESS OF PREPARING THE NEXT GENERATION TO:

- ASSUME AND BE PREPARED TO ASSUME MANAGEMENT AND DECISION MAKING.
- ENSURE A SMOOTH TRANSITION WHILE ENSURING THE FUTURE OF THE OPERATION.

ASK FOR OUR FREE GUIDE

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#3

INVESTMENTS & MARKET UPDATES

UTILIZING INVESTMENTS TO HELP ACCOMPLISH YOUR GOALS INCLUDING:

- RETIREMENT PLANS
- MANAGED ACCOUNTS
- BROKERAGE ACCOUNTS
- QUARTERLY UPDATES

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#4 EDUCATION PLANNING

LOTS OF GREAT OPTIONS FOR YOU KIDS THAT CAN PROVIDE TAX SAVINGS. PAIRED WITH SOME TAX STRATEGIES YOU CAN REALLY SEE THE BENEFITS!

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#5

FULL FINANCIAL ANALYSIS

WITH A COMBINED EXPERIENCE OF OVER 25 YEARS IN THE BANKING INDUSTRY PAIRED WITH AN UNDERSTANDING OF THE FINANCIAL MARKETS WE HELP WITH:

- BUSINESS PLANNING
- DEBT REDUCTION
- RATIO MONITORING
- HELPING YOU BE PREPARED FOR THOSE BIG OPPORTUNITIES YOU WILL GET

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#6

RETIREMENT/ MAJOR LIFE CHANGES

LIFE IS CONSTANTLY CHANGING AND SO ARE YOUR GOALS. WE ARE HERE TO HELP YOU PLAN AND ADJUST TO THOSE CHANGES.

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#7

TAX STRATEGIES

TAX PLANNING AND STRATEGIES TO HELP KEEP MORE OF YOUR OWN MONEY IS IMPORTANT. THERE ARE SOME GREAT TOOLS AND STRATEGIES THAT SEPERATE THE WEALTHY FROM THE STRUGGLING.

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WEALTH ADVISOR

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READY TO IMPROVE YOUR FINANCIAL SITUATION

GIVE US A CALL OR STOP IN
O: 308-762-5542
C: 307-340-1935
E: MAVERICK.CHURCHILL@LPL.COM

BEING ACCOUNTABLE AND PREPARED LETS YOU BE READY FOR WHAT THE FUTURE HOLDS