LCV ADVISORS

Comprehensive Service Model

LCV Advisors offers comprehensive investment management and financial advisory services to meet your unique needs. Our services include:

- Customized investment management according to risk tolerance, time horizon and goals
- Retirement planning including investment progress monitoring and rebalancing
- 401k and deferred compensation plan review
- Coordination with your other financial professionals (CPAs, attorneys).
- Financial literacy education for children and grandchildren
- Tax planning including investment loss/gain optimization
- College savings planning and investment analysis
- Managing stock concentration risk
- Life insurance needs analysis

LCV Advisors is a fee-only firm, so our advice and services are unbiased, transparent and in the best interest of our clients. We do not sell products or receive commission. Plain and simple: We're paid directly by clients for our services.

CFA Institute

NAPFA THE NATIONAL ASSOCIATION OF PERSONAL FINANCIAL ADVISORS

XY PLANNING NETWORK