NORTHSTAR

FINANCIAL PLANNING

Managing Your Wealth as a Business Owner

Building Wealth
Beyond Your Business

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How We Can Help

You make hundreds of decisions for others—who's helping you make the right ones for yourself?

Northstar's ongoing, holistic wealth management services give you the structure, insights, and accountability to feel confident and in control of your financial future. We help you:

- Build a coordinated, actionable plan for your finances
- Reclaim your time and reduce decision fatigue
- Navigate competing priorities (kids, aging parents, business goals, retirement)
- Stress-test your business and personal financial decisions
- Visualize what's possible—then take steps to make it happen

With Northstar, you don't have to figure it all out alone. We simplify the complex so you can focus on what matters most.

WEALTH MANAGEMENT SERVICES

Strategic Financial Planning for Business Owners

Fiduciary Advice

- Define what success looks like—beyond the numbers.
- Prioritize your entire financial life
- Set goals, monitor, and adjust as needed
- Create an action plan that moves you forward
- Implement your personalized investment plan
- Feel confident with guidance and reporting

At Northstar, we help you think about, then confidently act upon, your wealth and your life.

SERVICES FOR BUSINESS OWNERS

As a business owner or executive, your time is valuable—and so is your financial future. At Northstar, we help you plan strategically across all areas of your personal and business finances so you can grow with confidence and protect what you've built.

1. CASH FLOW AND INVESTMENT PLANNING

Manage and optimize cash flow through a combination of financial planning, investment management, and strategic advisory services.

TAX STRATEGY

Help you stay ahead of tax liabilities by coordinating with a CPA year-round. We help you uncover deductions, optimize your estimated payments, and avoid costly surprises.

RISK MANAGEMENT

Identify and prepare for the risks you can control—and safeguard your wealth so your family stays protected.

RETIREMENT PLANNING

We guide you through retirement plan funding options —like SEP IRAs and Roth IRAs—so your future doesn't take a back seat to your business.

ESTATE PLANNING

Protect your business and your family with a clear estate plan that minimizes taxes and outlines succession strategies.

EXIT STRATEGY

Whether you plan to sell, scale back, or step away, we help you prepare for a smooth and profitable transition when the time comes.

COST OF SERVICES

Our services are best suited to clients with $1,000,000 or more in personal and business retirement plan assets.

We are happy to provide a **customized quote** at your complimentary Discovery Meeting.

How We Work with You

- Highly personalized planning experience with ongoing updates
- Unique knowledge and expertise in financial planning for executives and business owners
- Trusted thinking partner through every business and life transition
- Timely and reliable communication
- Collaboration with professional team and other advisors
- Offering relief and peace of mind for you and your family

Let us help you take care of what matters most.

NORTHSTAR
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YOUR LIFE. YOUR MONEY. YOUR STRATEGY.

Whether you're growing a company, planning your next chapter, or juggling multiple financial roles, we bring expert guidance and personalized planning to help you:

- Maximize your income and assets
- Protect your family and business
- Free up time to lead with clarity and confidence

As fee-only fiduciaries, we always put your best interest first when it comes to providing objective advice, managing your wealth, and helping you make confident financial decisions for your business and your life.

READY TO FOCUS ON YOUR FINANCIAL FUTURE?

We offer a complimentary **Get Acquainted Meeting** to discuss your unique needs and outline a plan of action.

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