Signature
WEALTH & TAX

This letter lets you know the extent of services we offer here at Signature Wealth and Tax. Our business model has many aspects so we are sending this letter to inform you of the options available through Signature Wealth and Tax. If you require any of the following, we sincerely hope you will let us know so we can evaluate whether we can help you.

Financial Services: My niche is *Retirement Income Planning*. This is for the person who wishes to ensure their income during retirement. Did you know that with proper planning and high-level strategies, you can achieve the income you desire and eliminate money worries in retirement? We can create a retirement income plan for you or someone you know who is approaching retirement.

Managed Brokerage Accounts: Our custodian is Charles Schwab. Through this custodian, we handle retirement accounts and individual or joint accounts linked directly to your bank account for easy handling should you require a withdrawal or wish to transfer money into your account.

Tax Preparation: I am registered with the IRS as an Annual Filing System Participant and have been preparing taxes for 18 years. We electronically file your tax return and offer options to e-mail documents in a secure account, prepare the return while you are in our office, or for you to drop off the materials for a later pickup.

Tax Strategies: For high-income clients ($500,000 and up), we offer a consultation jointly with Signature Wealth and Tax and an attorney firm that specializes in tax strategy options to reduce your taxes.

Insurance Services: Because we are brokers, we have access to a wide array of companies to help you find the right policy. Whether you need life insurance, an annuity, assistance with an existing annuity, or long-term care, we can shop for the correct option for you.

Health Insurance Supplement: This is available to employers who wish to save up to $563.70 per employee per year for each employee who participates in the supplemental plan. This is available to employers who have a minimum of 10 W2 employees. This offering is in addition to the existing health insurance plan. Even if the employer doesn't offer health insurance, this Champ plan can still be an option for their employees.

Home Health Care Select: We represent a company that offers reimbursement to people who wish to recuperate at home from an injury, or chronic debilitating illness. Working through a home health care agency, the insured can receive reimbursement for physical therapy, speech pathology and other specialties (reimburses up to $450 per day). Even if paid for by Medicare, you can still receive reimbursement. The policy also offers an aide who can come to your home and cook, clean, do laundry, run errands, assist with showering, etc. This policy pays $120/day for this service.

Finally, we have a large number of professional associations. If you need anything from a Realtor, an attorney, a contractor, title company, mortgage loan officer, or any other specialty, please let us know. We would be happy to send you some names of people we feel comfortable with to assist you.

Brought to you by

Signature WEALTH & TAX

CONNIE D. DENSMORE
Financial Advisor
1-702-655-3333
www.signaturewealthandtax.com

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