PFB Pugh-Bellmar Financial

Focus - Perspective - Partnership

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Clarify vision & Future	Balance Work & Life	Create Financial Comfort	Help & Protect Family	Build a Legacy
Plan for the Future Financial Planning Retirement Income Distribution Strategies Business Succession	**Meet Needs** Income Planning Expense/Budgeting Social Security Corporate Benefits	**Simplify Finances** Investment & Savings Home & Assets Emergency Funding Automate	**Help Children** Allowance & Savings Loans & Gifting Special Needs Learning About Money	**Execute Intentions** Wills & Trusts Power of Attorney Medical Directives Protect Heirs
Ease Life's Transitions Marriage/Divorce Birth/Death Leaving My Home Career & Profession	**Enhance Lifestyle** Vacation Home Family Trips & Events Hobbies & Leisure Lease vs. Buy	**Reduce Taxes** Tax-Loss Harvesting Asset Location Stock Options Strategies Review of Cost Basis	**Assist Parents** Long-Term Care Eldercare Counseling Medical & Housing	**Help Beneficiaries** Designations Special Needs Trusts & Trustees Valuations/Projections
Live My Values Clarify My Mission Give to Community Volunteer My Time Align Investments	**Manage Health** Medicare/Supplemental Long-Term Care Care Concierge Wellness & Nutrition	**Protect Assets** Insurance Liquidity Business Continuity Corporate Structure	**Fund Education** Savings & Investments Pre-Paid Tuition Student/Parent Loans Grants/Scholarships	**Give to Charities** Planning & Strategies Tax-Advantaged Gifts Low-Basis Assets

Build: We can utilize a variety of accounts, investments, insurance, and other tactics to implement your financial objectives.

Portfolio Management
401k/SEPs/Defined Benefit
Retirement Income Strategies

IRAs/ROTHs
Insurance
Required Minimum Distribution Planning

Trust Accounts
529s/Custodial
Mortgages

Key Partnerships: Our professional team includes allied professionals that help us implement strategies.

Accountants (CPA)
LTC Professional
Mortgage Broker

Estate Planning Attorney
Elder Care Attorney
Real Estate Broker

Business Attorney
Insurance Broker
Notary Services