

TAKE A MOMENT TO THINK ABOUT YOUR GOALS.

A second home? College education? Pursuing a passion? Early retirement? Financial security for your family?

If you're like most people, the expenses of everyday life often get in the way of the bigger picture. You work hard to earn a living, but more and more of your paycheck is taken away, leaving you with less money to finance your goals. Fortunately, you don't have to be a multi-millionaire to take advantage of wealth building strategies. A little planning is all it takes to help turn your dreams into realities. And it's never too early, or too late, to start the planning process.

At Maner Costerisan, our top priority is to help you understand your financial situation, create a plan to work toward your goals and develop strategies for keeping and growing more of what you make. Our professionals are experts at finding ways to help you plan for the future and achieve your goals.

As a current Maner Costerisan client, we encourage you to think about your financial needs and share them with us. By maintaining close, long term relationships, we'll know first hand where you've been, where you want to go and what's happening in your life that can affect you getting there. Maybe you've recently gotten married, invested in real estate or perhaps received an inheritance; we know how to make these life events work in your favor.

Being aware of the details, but keeping an eye on the big picture, we'll work with you to make the most of your financial assets. Our advisors can assist with:

- Tax planning and preparation
- Trust and estate planning
- Personal financial statements
- Charitable donation planning
- Retirement consulting
- Valuations for estate, marital or probate matters
- Pension planning
- Education Savings
- Business startup consulting
- Succession planning

Our reputation at Maner Costerisan is built on progressive thinking, old fashioned values, exceptional service and superior quality. We would welcome any opportunity to discuss our services in further detail and help you create a plan to reach your financial goals.



Certified Public Accountants
Business & Technology Advisors

