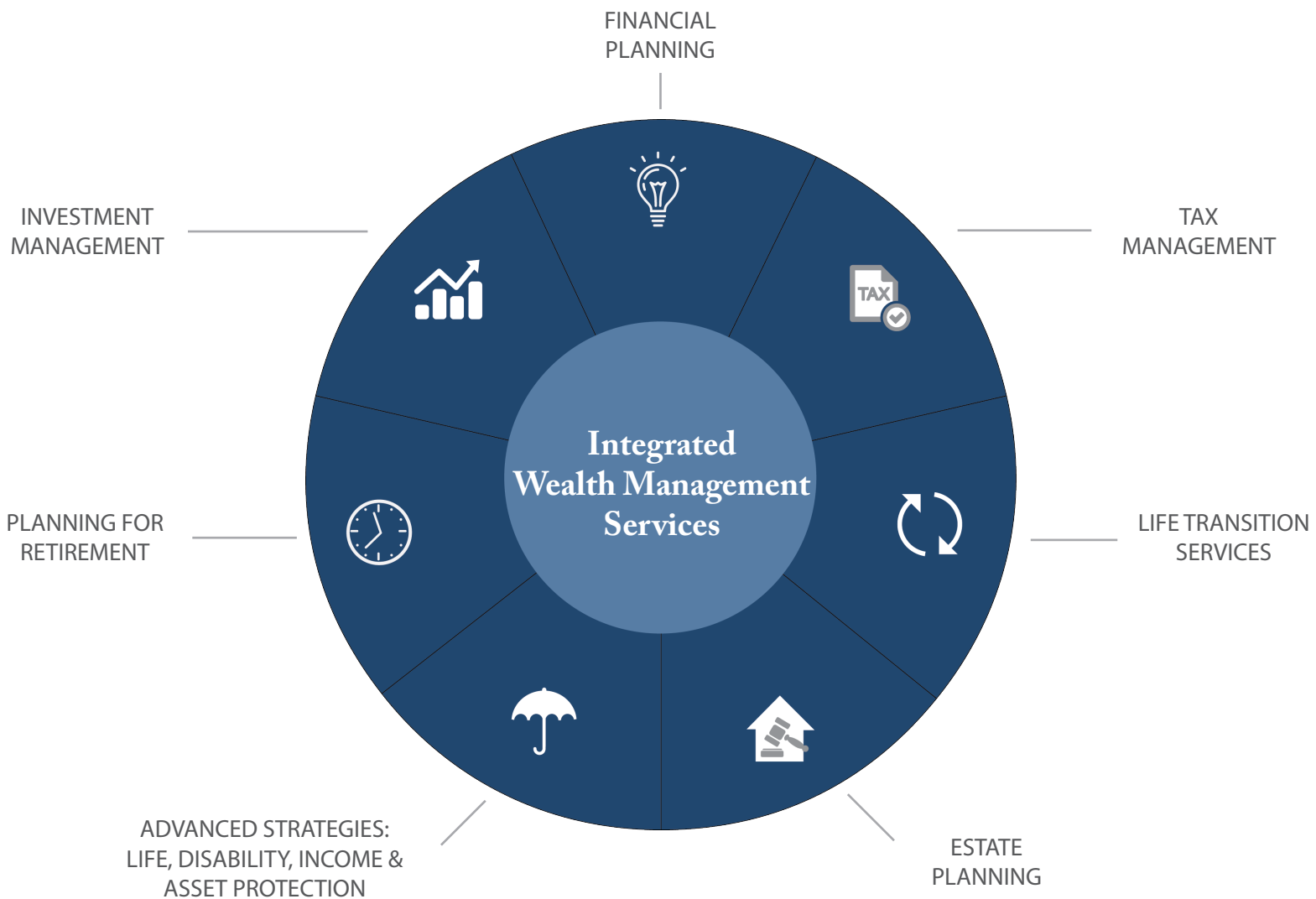


# Cassaday & Company, Inc.

## Integrated Wealth Management Services

At Cassaday & Company, Inc., we take a comprehensive, 360-degree view of your financial situation in order to provide integrated financial planning and investment solutions. You have direct access to a highly trained team who will work to understand all the complex, interrelated parts of your life. Our approach begins with three fundamental steps: consolidation, integration and simplification. We believe that by consolidating your finances and integrating them into a comprehensive plan, your financial road map will be sophisticated and transparent, yet simple to understand.





## Investment Management

- Goals, time frames and risk tolerance assessment
- Asset allocation recommendation
- Portfolio design and construction
- Continuous portfolio monitoring, rebalancing and maintenance
- Ongoing portfolio manager evaluation



## Planning for Retirement

- Patented portfolio withdrawal strategies (DIESEL)
- Social Security analysis
- Medicare and private healthcare planning
- Comprehensive retirement plan review
- Employee benefits and pension plan analysis
- Assessment of continuing care communities



## Financial Planning

- Financial goal analysis and recommendation
- Education planning
  - Complimentary 529 plan management
  - College savings plan ownership strategies
  - Financial aid guidance
  - Access to concierge medicine, life coaches, downsizing and special needs professionals



## Tax Management\*

- Identification of tax efficiencies
- Collaboration with your tax professionals
- Tax loss harvesting
- Charitable giving strategies



## Advanced Strategies:

### Life, Disability, Income & Asset Protection

- Comprehensive analysis of life, disability, and long-term care insurance policies
- Annuity analysis, management and ongoing service
- Group 401(k) management and oversight
- Employee benefits and pension plan analysis
- Long-term care advocacy
- Active involvement in insurance claim execution



## Life Transition Services

- Social Security analysis
- Medicare & private healthcare planning
- Assessment of continuing care communities
- Assistance with life & long-term care insurance claims
- Memory care & managing cognitive challenges
- Relocation planning - downsizing & estate sales
- Eldercare coordination
- Bookkeeping & bill payment management



## Estate Planning\*

- Estate plan review
- Collaboration with your estate planning attorney
- Strategies to minimize estate taxes
- Independent trustee referral solutions
- Legacy planning
- Estate administration

\* Employees of Cassaday & Company, Inc. or Royal Alliance Associates are not attorneys or CPAs and may not give legal or tax advice.

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Contact us for a complimentary second opinion about your current financial plan at (703)506-8200.

# CASSADAY & COMPANY, INC

INDEPENDENT WEALTH MANAGEMENT

CONSOLIDATION • INTEGRATION • SIMPLIFICATION

8180 GREENSBORO DR. SUITE 1180, MCLEAN, VA 22102

PHONE (703) 506-8200 | WWW.CASSADAY.COM

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