HARMONIZING WEALTH AND TAXES

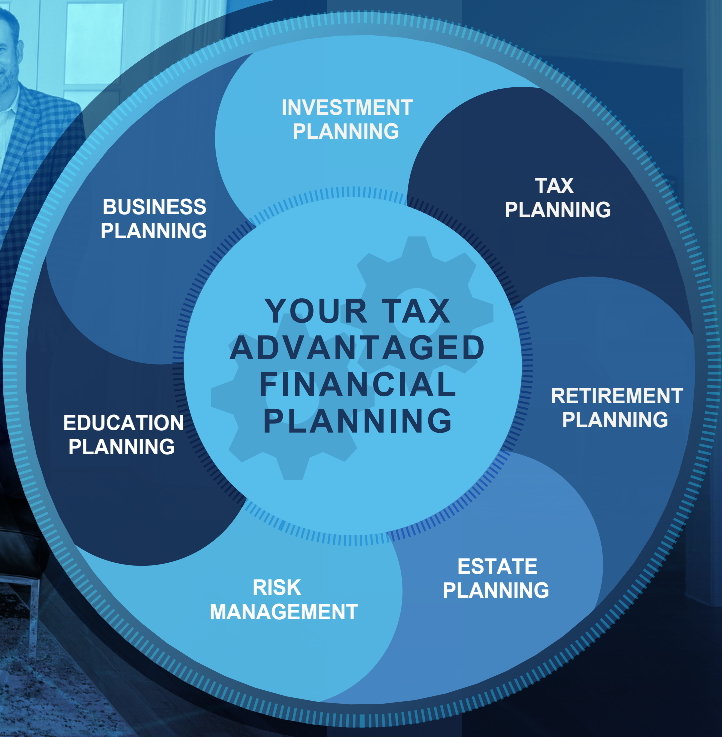
To ensure success, the components of your finances must harmonize. Combining the knowledge and experience of two of the Triad's premier firms can help cover your bases and prepare for a satisfying retirement. That's why Maestro Wealth Advisors and Smith Leonard Accountants & Consultants have partnered to deliver a holistic approach to your financial health.

The same Smith Leonard team you know and trust with your accounting needs is delighted to bring you expanded, tax-savvy financial planning and wealth management capabilities. With a full financial team in one place, we are able to blend both the practical aspects of tax planning with the aspirational aspects of funding your future.

INTRODUCING

MAESTRO WEALTH ADVISORS

- **We know you and you know us, which provides an essential baseline for trust.**
- **Our group has a strong focus on tax-advantaged financial planning, so you don't have to sacrifice one for the other.**
- **Your CPA and Wealth Advisor are on the same team (or may even be the same person), which allows for optimal coordination of tax and investment planning.**



www.smith-leonard.com/maestrowealth

COLLABORATIVE APPROACH

EXPANSIVE SUITE OF SERVICES

INVESTMENT PLANNING

- Asset Allocation
- Portfolio Design
- Diversification Strategies
- Alternative Investments
- Fixed-Income Strategies
- Investment Policy Statement
- Monitoring and Review
- Risk Budget

TAX PLANNING

- Tax-Optimized Investing
- Charitable Planning
- Tax-Loss Harvesting
- Tax Burden Reduction
- Estate Tax Planning

RETIREMENT PLANNING

- Distribution Planning
- IRA Contributions and Rollovers
- Income Projection Analysis
- Risk Budget
- Long-Term Care Planning

ESTATE PLANNING

- Tax Reduction
- Wealth Transfer
- Charitable Giving
- Trust Services
- Wills
- Irrevocable Life Insurance Trusts
- Elder Care Planning
- Incapacitation and Asset Control

RISK MANAGEMENT

- Life Insurance Analysis/Design
- Long-Term Care Insurance
- Income Replacement
- Disability Protection
- Creditor Protection
- Divorce

EDUCATION PLANNING

- Education Savings Accounts
- 529 College Savings Plans
- UGMA/UTMA Accounts

BUSINESS PLANNING

- Business Succession
- Buy-Sell Agreements
- Qualified Retirement Plans
- Non-Qualified Retirement Plans
- Key Employee Retention
- Transaction Advisory
- Business Valuation

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