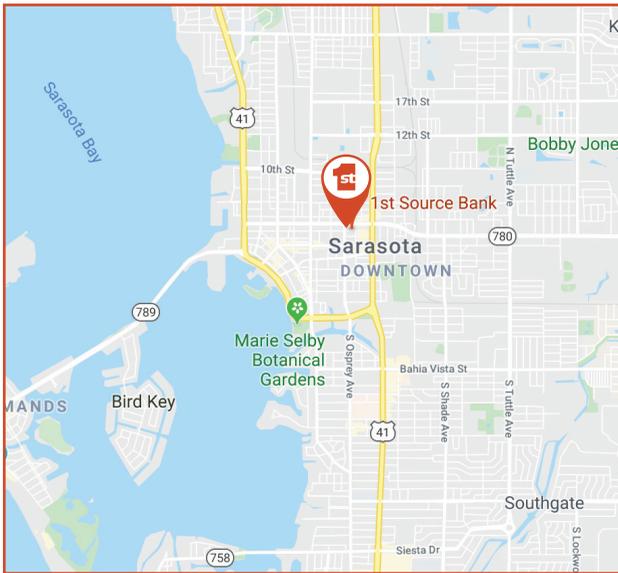


**Offering straight talk and sound advice about common Florida residency questions:**

- Should Florida be established as primary legal domicile?
- What unique estate and income tax advantages are available for full or part-time Florida residents?
- What non-tax issues should be addressed when establishing Florida residency?

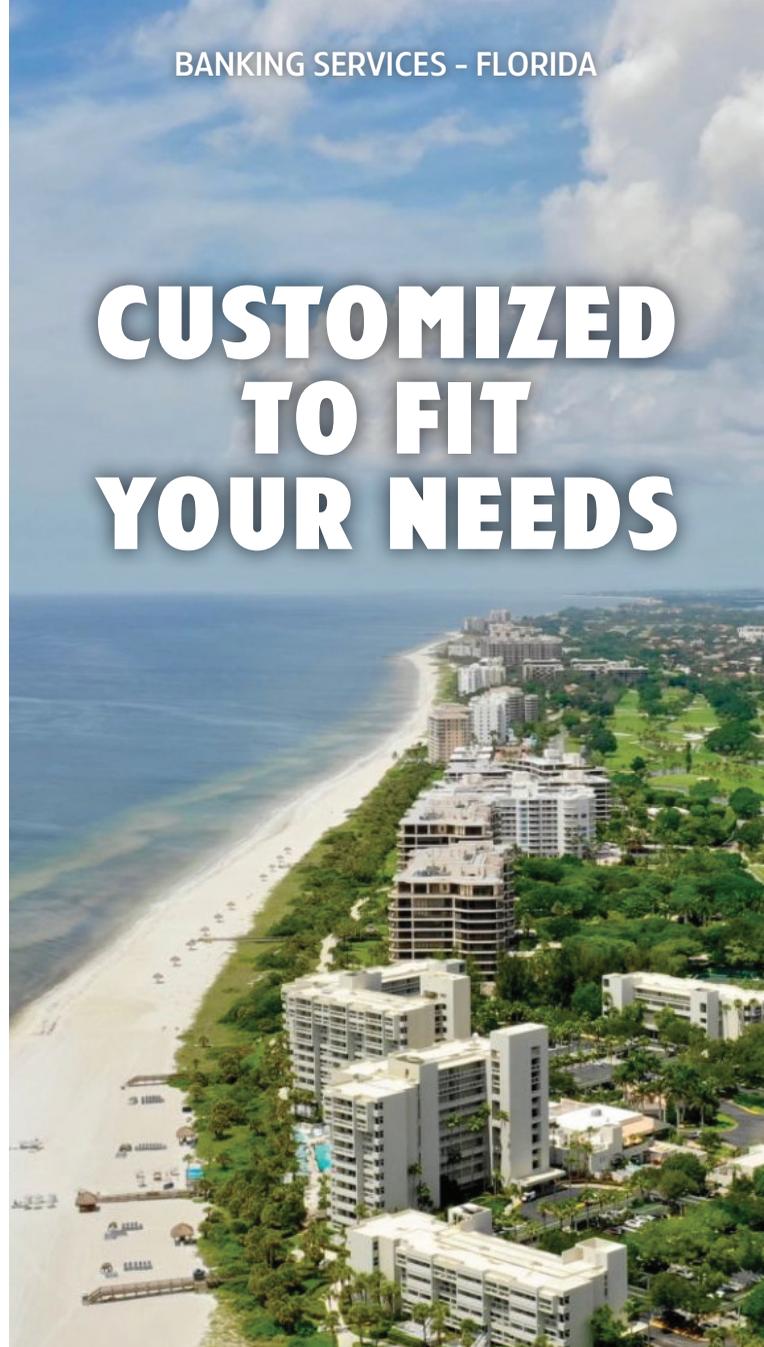
This information does not constitute tax or legal advice. Please consult your tax and/or legal advisor regarding your specific situation before making any decisions.



**WE ARE HERE FOR YOU 10AM - 2PM  
AND BY APPOINTMENT**

1800 2nd Street, Suite 712  
Sarasota, FL 34236  
**941-554-2605**

**CUSTOMIZED  
TO FIT  
YOUR NEEDS**



# WE ARE HERE TO HELP YOU BUILD WEALTH AND REALIZE YOUR DREAMS



## BANKING SERVICES

- Private Banking when and where it's convenient for you — we bring the bank to you, day and night
- Secure, easy to use online and mobile services
- Checking and savings accounts
- Customized lending and deposit services
- Flexible options for unique mortgage situations, including multiple homes
- Construction mortgages
- Business and commercial lending options
- Lines of credit (secured and unsecured options)



## WEALTH ADVISORY SERVICES

- Administration of trusts and estates for Florida residents (full and part-time)
- Investment management
- IRA and 401(k) rollovers
- Charitable trust administration
- Donor-Advised Fund services
- Foundation management
- Tax planning and advisory services
- Comprehensive financial planning
- Estate and investment review