## Parsec Brochure & Folder

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ParsecFinancial

A retirement plan is a cornerstone of most employer benefit packages. We understand the needs and challenges of business owners in the management of these retirement benefits. Through our retirement plan solutions, we give the business owner a tool that recruits, rewards and retains qualified employees.

> YOUR PARSEC WEALTH MANAGEMENT TEAM

> > TEAM LEADER

Manages the Relationship and the Team

> THE CLIENT

> > CLIENT SERVICE

PROFESSIONAL

Supports the Team as well as the Client

PORTFOLIO MANAGER/

FINANCIAL PLANNER

Creates Your Plan and Portfolio





Business Retirement Plans

## Quality

We know that each employer is different and a one-size-fits-all approach is not always appropriate. We seek to understand your business first, as well as your goals as a business owner. It is through this process that we are able to create a solution that works best for you.

## Service

We provide employee education as a part of our service, with the intention of helping employees understand the importance of their plan. We encourage participation and provide guidance on retirement decisions. For business owners, we offer a guided process that makes implementation of our recommendations as smooth as possible.

## Trust

As a fee-only provider we do not participate in a revenue sharing arrangement with the mutual funds we recommend; there are no hidden fees. And because we have a fiduciary duty to put our clients' interests before our own, our advice is not biased by a limited product line or promise of commission.

Parsec Wealth Management integrates your financial plan with your investments.

Parsec Wealth Management

Parsec Wealth Management is our service for clients with more than \$400,000 in assets. It includes both investment management and financial planning. Our process involves an in-depth analysis of your current financial circumstances and an evaluation of your strengths and weaknesses. After discussing your long-term goals and helping determine your risk tolerance, we develop a personalized plan that covers investments, retirement planning, education planning, taxes, estate planning issues and insurance. And because the only constant in life is change, we update your plan annually to monitor your progress toward achieving your padis.

We are your family's CFO. We look at your finances and report to you. This holistic approach allows us to help you with long range planning. When can you retrie? How much should you be saving? Or are you in retirement and need to make sure that your assets will last your lifetime? The answers to these questions are crucial in giving you the confidence you need to invest visely.





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