PILLAR
FINANCIAL SERVICES, INC.
Financial solutions for all of life's changes.

Client-Centered Services

We provide solutions to your financial challenges through the following list of services

Securing Your Family's Financial Future

Advise you on achieving financial independence

Help you develop life-goals

Help you coordinate with your other professionals

Help you create a family legacy

Advise you on charitable gifting strategies

Tax Planning

Work to reduce your income taxes

Defer taxable income

Generate future tax-favored income

Minimize and offset capital gain taxes

Tax reporting for income tax preparation

Stock options, concentrated stock and highly appreciated stock or real estate analysis and planning

Estate Planning

Maintain maximum legal control over assets

Minimize estate taxes

Protect assets from creditors

Provide incentives for children/beneficiaries

Asset protection analysis and insurance review

Exiting Strategies for Entrepreneurs

Business sale planning

Maximize business value

Minimize transfer taxes

Manage family business succession

Reduce estate expenses and delays

Business loan analysis

Private Wealth Management

Comprehensive retirement planning

Asset allocation

Investment planning and consulting

Portfolio performance monitoring

Retirement income planning

Diversify investment assets

Work to increase your current spendable income

Manage timing of taxable income

Reduce investment volatility

Reduce money management fees

Portfolio and money manger monitoring

Online portfolio account access

Monthly consolidated statements

What-if planning due to changes in your circumstances

Unscheduled meetings and phone calls (as warranted)

Ongoing progress meetings

Other Services

Debt consulting (lines of credit, mortgages etc.)

College Education planning (529, UGMA etc.)

Operational services (check writing privileges, beneficiary changes, wiring money)

Client education and appreciation events

Assistance with aging parents and care-giving