

# OUR SERVICES

Spinnaker aims to deliver the highest level of service and can help you set your short and long-term goals, navigate the complex financial marketplace, and identify investment strategies and portfolios that we believe are best suited for you and your financial independence. With over 30+ years of combined experience in the finance industry, Spinnaker can help with services defined below:

## 01. Financial Planning

Spinnaker will lead you through our financial planning process, designed to help you improve your investment decisions, lifestyle and financial wellness. We help with family gifting, funding college educations, retirement savings, legacy planning, reducing income taxes and wealth preservation.

## 02. Wealth Planning

Enjoy more free time and less stress by allowing Spinnaker to manage your assets. From discussing your asset allocation to investing in securities, we manage all aspects of your wealth so you can focus on what you do best.

## 03. Retirement Planning

Saving for retirement is a major goal for many investors. Although your retirement date seems far away, careful planning now will put a road map together to a comfortable retirement later. We help clients find what we believe are the best assets for growth and retirement security.

## 04. Asset Management

Spinnaker can help allocate assets and manage your investments. We customize each investment plan to meet your individual goals and help you navigate the complex financial marketplace. From rebalancing your portfolio to adjusting your risk tolerance, we can guide you through the many asset management options available.

## 05. Securities

Spinnaker performs research on a variety of exchange-traded funds, stocks, mutual funds and bonds. Using this knowledge, we adjust portfolios as the markets change to match your personal investing goals.

