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www.WilsonAdvisorsLLC.com

# Financial Guidance for Individuals and Businesses

Wilson Advisors, LLC

## Products and Services

- Portfolio and Retirement Plan Reviews
- Retirement Plan Rollovers and Consolidation
- Systematic Investing - Dividend and Income/Monthly
- Investor Education Programs
- Employee Benefits
- Estate Planning/Asset Protection
  - Wills
  - Trusts
  - Power of Attorney - Financial and Health
  - Healthcare Directives
  - Special Needs Directives

- Financial Consulting and Investments
  Retirement Plans
  - 401(k), 403(b), Roth 401(k) and 403(b) Profit Sharing, Money Purchases,
  - Non - Qualified Deferred Compensation
  - IRAs -Traditional and Roth
  - College Plans and Educational IRAs
  - Mutual Funds
  - Annuities - Fixed, Variable, Indexed, Immediate
  - Brokerage Accounts Fee Only
  - Business and Succession Planning
- Insurance Planning
  - Disability Income
  - Life - Term, Universal
  - Long Term Care
  - Key - Person
  - Buy - Sell
- Tax Planning
  - Individual
  - Business
  - International

## Our Team

- Robert Farris
  Licensed Insurance Counselor
  Managing Member

- Kevin Janeway
  CLTC
  Member

- David Lenda
  MBA, CLU, CHFC
  Member

- Peter Stava
  Financial Representative

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## Our Mission

Wilson Advisors mission is to create a uniquely professional environment attracting highly educated, talented individuals dedicated to the highest ethical standards and united with a common passion for providing unparalleled financial service to all who seek a more secure future.

## Our Commitment

Our staff consists of experienced professionals with a “hands on” approach to financial guidance. Not only do clients find our team members knowledgeable, but they also discover that our staff truly cares about our clients dreams and goals. We do everything in our power to keep our clients focused on where they want to go, advise them on how to get there, and continually remind them of the importance of maintaining a disciplined approach to realizing their dreams.

## Our Promise

Our company is based on the principle that education and understanding of one’s current financial situation is vital to successfully make prudent decisions concerning one’s future financial condition. If you have any questions about your current financial situation or wish to schedule a complimentary consultation, give us a call at
**(248) 864-7440**