EAGLE ROCK

a Greenberg & Rapp Company

Investment & Wealth Services

Financial Planning – We create a personal financial plan specific to your goals and help construct and execute the plan with all considerations in mind. Delegating your finances to someone you can trust allows you to focus on what you enjoy.

Investment Management – We determine, advise, implement and monitor your personal investments in concert with your risk tolerance. Continuous monitoring and consistent re-balancing of accounts to ensure you stay within your risk parameters.

Retirement/Cash Flow Projections –We run cash flow reports that will help you predict your ability to achieve your specific, customized goals and objectives.

Outside 401(k) and Qualified/Non-Qualified Plan Consultation – We make certain your company qualified plan complements your entire investment portfolio. For business owners, we can also help you start a qualified or non-qualified plan for you and your employees.

Social Security Income Analysis – We assist you in choosing the strategy and timing that best suits your situation.

Wealth Management Account Aggregation Portal – Our online system provides access to consolidated, real-time view of all key banking, investment and insurance accounts with one secure log-in. You can also store key personal and financial documents in a protected online vault that can be accessed at your convenience.

Insurance Review – We conduct a comprehensive needs analysis and review your existing life, LTD, and LTC portfolio to be sure you have the most efficient and effective coverage to meet your needs.

Legacy Planning – We plan for the orderly coordination of your affairs to transfer wealth to the next generation as desired.

Charitable Planning Strategies – We will help you understand the most appropriate way to benefit the charity or charities of your choice and the potential tax benefits of your charitable giving.

Document Review – Our professionals will ensure your documents are aligned with your goals.

Coordinate with other Tax and Legal Professionals – As needed, we meet with you and your other trusted advisors to ensure strategies are aligned with your goals.

Access to Expert Network – You will have access to our network of specialists in multiple areas of experience: CPA's, attorneys, mortgage consultants, bankers, etc.

Review Meetings – We will meet with you throughout the year to monitor your situation, to ensure the plan is always aligned to your goals and to keep you on track.

67 East Park Place, Suite 750 | Morristown, NJ | 07960
www.greenbergandrapp.com | o: 973-434-8700 | e: info@greenbergandrapp.com