

# Individual Financial Services



*We deliver objectives*

**B**eason & Nalley is committed to working closely with each of our clients in order to build a relationship that lasts. To us, it is important to fully understand our clients' goals and objectives so we are better equipped to help you achieve them. We are committed to staying in touch with your individual financial issues throughout the year, and we will ensure that you receive the personal service you need.

Whether you are concerned with budgeting, college planning, risk management, retirement or estate counseling, we can help you develop a financial roadmap to address each of these concerns. We will guide you each step of the way and be available to address new questions as they arise and inform you when we are aware of potential opportunities from which you may benefit. In addition, through monitoring your overall tax situation throughout the year, we will eliminate any unnecessary surprises as you prepare for your April 15th income tax filing.

## Our Team Provides You With the Resources You Need

- Estate and retirement counseling
- Individual income tax planning
- Individual and trust income tax return preparation
- Estate and gift tax return preparation

## Developing Strategies That Provide You Sound Financial Advice

- Comprehensive life-long financial partner services
- Assistance with implementation and monitoring of overall financial objectives
- Group of highly qualified individuals objective in their recommendations as we do not sell products
- Income tax return preparation that takes the burden off of you yet keeps you informed of your tax situation

Through understanding your needs and helping you establish objectives, together we will build a relationship that will help you achieve your financial goals.

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