

Olympic View Group - Our services

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Wealth management planning	Estate planning and charitable giving	Retirement planning	Risk management and insurance	Cash flow and budget	Assistance to loved ones	Income tax planning
Portfolio review	Gifts to family and charity	Retirement goal setting	Review of existing policies	Income sources	Gifts	Review of cost basis
Asset allocation	Multi-jurisdiction planning	Social Security and Medicare	Risk tolerance planning	Expenses and budgeting	Education planning	Review realized gains
Withdrawal strategies	Trusts & Irrevocable life insurance trusts	Business owner solutions and Self-employed retirement plans	Review of potential outstanding risks	Debt management	529 College savings plans	Carry forward losses
Investment Policy Statement	Charitable services and donor advised funds	IRA contributions and conversions	Life insurance needs and strategies	Liquidity and banking solutions	Navigating care expenses	Tax-loss harvesting
Investment portfolio construction, implementation and review	Estate planning for unique family situations	Employer-sponsored plans and 401(k)s	Long-term care insurance	Lines of credit	Roth IRAs for children	Deductions and credits
Stock concentration	Wealth transfer	Annuities and pensions	Disability insurance	Large expense planning	UGMA/UTMA	Potential Roth conversions
Review investments held outside the firm	Coordinate with attorneys	RMD and withdrawal strategies	Liability coverage	Emergency funding	ABLE Trusts	Health Savings and Flexible Spending
Regular Meetings to ensure planning is well implemented				Dollar cost averaging		Coordinate with personal and business accountants
				Mortgage review		

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Wealth Management

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