

Services available

Red Rose Investment Group



Wealth
Management

As a preferred client of Red Rose Investment Group, you have our commitment to provide quality service to you and your family. As part of our value, we want you to be aware of some of the services we provide you in our effort to be your complete advisory team.

We utilize research and services from many sources, including RBC Wealth Management. We combine this research with our own insights that we have gained from more than 100 years of combined wealth management experience. We meet regularly to evaluate our current model strategies and to review our market outlook.

Services:

- 401(k)/403(b) rollovers
- Beneficiary review
- Budgeting services
- Business evaluation and transition strategies
- Cash management/liquidity, credit access line
- Client service (nine experienced team members to serve you)
- Covered call option strategies
- Education planning
- Employee stock plan strategies
- Estate and legacy planning services
- Insurance/annuity evaluation
- Insurance needs
- Investment access account (check writing and debit cards)
- Investment management
- Long-term care insurance
- Online access (www.redroseinvestmentgroup.com)
- Profit-sharing plans
- Retirement planning

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- Social Security planning
- Tax considerate strategies
- Trust services through affiliates*
- WealthPlan financial analysis
- Willing to work with your attorney or tax consultant

Based on a relationship of mutual trust, we help our clients attain and maintain a secure lifestyle and achieve success in reaching their financial goals.

We look forward to serving you.

Trust services are provided by third parties. RBC Wealth Management and/or your financial advisor may receive compensation in connection with offering or referring these services. Neither RBC Wealth Management nor its financial advisors are able to serve as trustee. RBC Wealth Management does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.

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The projections or other information generated by WealthPlan regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results and are not guarantees of future results. Results may vary with each use and over time.