HighMark
WEALTH MANAGEMENT

About HighMark WM

HighMark WM is fundamentally different from most financial advisors:

- We advise on all personal financial matters, integrating every aspect of our clients' financial affairs and managing execution on their behalf.
- We manage assets for individuals, not institutions and serve clients throughout the U.S. and overseas. Our clients include successful professionals, senior level executives, entrepreneurs and individuals with substantial and complex assets.
- We don't sell financial products nor do we have any conflicts of interest with our clients.

The HighMark WM Relationship

As a client, we will work directly with your Accountant and Attorney to provide you with complete and personalized wealth management. Our advice and management includes the following areas of expertise:

Investment Management
Portfolio Construction
Asset Allocation Strategies
Analysis and Advice on Private Investments
College Education Funding Vehicles
In-depth Risk Tolerance Analysis

Financial Decision Making
Home Purchase Decisions & Mortgage Selection Assistance
Advice on Corporate Benefits Programs
Prenuptial Agreements/Marital Dissolution
Business/Substantial Asset Acquisitions
Negotiated Investments
Charitable Giving Guidance
Debt Restructuring

Tax Planning
Estate Tax Strategies
Transaction Analysis
Tax Law Changes
Review of Tax Returns

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Trust & Estate Planning
Wills
Revocable Trusts
Life Insurance Trusts
Inter vivos Trusts
Gifting Strategies

Insurance Consultation
Life Insurance
Disability Insurance
Property & Casualty Insurance
General Liability Insurance
Long Term Care Insurance

Business Owner Solutions
Succession Planning
Cash Flow Strategies
Employee Stock Option Planning

Retirement Planning
Develop & Achieve Savings Target
Pension Elections
401K/HR10 Asset Allocations
IRA Withdrawal Strategies
Cash Flow & Liability Management
Debt Restructuring

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