



## Private Client

*Planning for retirement has never been more challenging. The economy is down, the financial markets are unpredictable, and everything from food to healthcare seems to be getting more expensive. On top of that, most people have seen substantial declines in their retirement account and home equity values. So what can you do to get back on track? Call a CrossBridge advisor for help. The following are just a few of the services we offer:*

- Comprehensive Planning
- Retirement Accounts
- Investment Advice
- Life Insurance
- Estate Planning
- Trust Services
- Cash Management
- Tax Planning
- Charitable Contribution Planning
- Education Planning

*Retirement can be a wonderful time of life. Let CrossBridge help you clarify your financial goals and lay out a solid strategy to reach them. Call us today to schedule your free consultation.*

**CROSSBRIDGE**<sup>SM</sup>  
WEALTH MANAGEMENT

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