



Bring order, purpose, and direction to your wealth.

At SYM, expect a detail-minded approach to **optimizing your executive compensation.**

With over 55 years of experience, we're here to bring clarity and strategy—so you can focus on **mastering your profession.**

Disclosure: SYM Financial Advisors ("SYM") is an independent investment adviser registered under the Investment Advisers Act of 1940, as amended. Registration does not imply a certain level of skill or training. More information about SYM including our investment strategies, fees, and objectives can be found in our ADV Part 2 and/or Form CRS, both of which are available upon request.

sym.com | 800.888.7968

6 Top Areas We Review

FOR CORPORATE EXECUTIVES

sym.com | 800.888.7968

01 Financial Planning

- Investment management
- Establish financial goals and objectives
- Organize assets, liabilities, legal docs
- Set and track savings targets
- Employment transitions
- Retirement planning

02 Cash Flow Planning

- Cash flow projections
- Retirement cash flow analysis
- Social Security timing projections
- Education planning
- Major purchase planning & debt payoff

03 Equity Comp, Pension, & Benefits

- Equity compensation modeling
- Employer pension evaluation
- Executive benefits analysis
- Stock option analysis & recommendation
- Diversification strategies
- Strategy for stock holding mandates

04 Tax Planning

- Tax projections and estimated payments
- Tax efficient investment strategies
- Investment allocation analysis
- Collaborate with your tax professionals

05 Estate Planning

- Review critical decisions
- Consider estate tax mitigation
- Mapping estate directives
- Collaborate with your attorneys

06 Risk Assessment

- Life and disability insurance analysis
- Long-term care planning
- Property & casualty insurance assessment
- Group insurance benefits review

SYM Fiduciary Pledge to You

- 1 Maintain strict confidentiality.
- 2 Prioritize clients' interests above all else.
- 3 No sales commissions; full fee transparency.
- 4 Remain independent from banks, brokers, insurance companies, and custodians.

