

HOW WE ADD **VALUE**



FULFILLMENT

- Helping Accomplish Life's Purpose
- Leaving a Legacy

SERENITY

- Taking Care of Loved Ones
- Organized and in Control
- More Time
- Less Worry

HELPING ACHIEVE YOUR GOALS

- College
- Healthcare
- Retirement
- Estate
- Charity

MANAGING YOUR ASSETS

- Cash Flow
- Balance Sheet
- Asset Allocation
- Taxes
- Security Selection
- Insurance



1314 East Venice Avenue // Suite A // Venice, FL 34285 // 941.412.1400 // korszen.com

Raymond James & Associates, Inc., member New York Stock Exchange/SIPC
Raymond James and its advisors do not offer tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.