CorePlus

Wealth

MANAGEMENT

As a small business owner, your financial advisor can help you with the following:

- **Investment Management:** many business owners view their business as their retirement plan, but it is critical to have a diversified portfolio and knowledge of various financial strategies.

- **Retirement Planning:** Our financial advisor will help you determine which type of retirement plan is best you/your employees. Some retirement plans may also qualify you for a business tax deduction.

- **Sucesssion Planning:** While it is a sobering topic, it is pivitol to discuss what will happen in the event of your death or disability.

- **Market Trends:** Financial advisors are always studying current market trends and economical trends and can be a great resource for you.

Let's Talk

To set a no-cost, no-obligation appointment, call **Holland Rajaniemi at (860) 885-3680**, or email at **Holland.Rajaniemi@cunamutual.com**. Be sure to bring any documentation that will help your financial advisor understand your situation better such as account statements, tax forms, and benefit information. If married, it's best that both you and your spouse attend. Lastly, always bring an open mind and a willingness to discuss the details of your situation.

CorePlus Wealth MANAGEMENT

Located at CorePlus Credit Union