

# THE LIFE PLAN™

**Legal - Insurance - Financial - Estate**

**METZLER & DeSANTIS, LLP**  
**LAW FIRM**

## ESTATE PLANNING

Wills, Trusts, POA's  
Living Wills  
Elder Care  
Guardianships  
Legacy Planning  
Estate Administration  
Estate Litigation  
Fiduciary Tax Returns

## REAL ESTATE TRANSACTIONS

## BUSINESS SERVICES

Business Selection & Formation  
Succession Planning  
Owner Exit Strategies  
Business Transfers  
Mergers, Sales & Acquisitions

**STRYDE** / **G.M.G.**  
**BUSINESS CONSULTANTS**

## TAX & COST REDUCTION STRATEGIES

Specialized Tax  
Incentives  
Workers Opportunity  
Tax Credits  
Property Tax Abatement  
R&D Tax Credits  
Cost Segregation  
& Tax Refund  
Credit Card Processing  
Savings Audit  
Workers Compensation  
Insurance  
Cost Reduction  
Waste Recycling  
Cost Reduction

## BUSINESS OWNERS

STRYDE - SRP  
Retirement Solution  
Exit Strategies

**APOGEE**  
**FINANCIAL SERVICES GROUP**

## WEALTH MANAGEMENT

Registered Investment  
Advisor  
Charles Schwab Advisor  
Retirement & Retirement  
Income Planning  
Social Security  
Planning  
Long Term Care  
Planning  
Personal Financial  
Planning  
Debt Elimination &  
Programmed Savings  
Solutions  
Personal & Business  
Tax Planning  
Personal & Business  
Tax Return Preparation

**INNOVATIVE**  
**RETIREMENT SOLUTIONS**

## CRASH PROOF RETIREMENT SOLUTIONS

Tax Favored Retirement  
Solutions  
Retirement Plan Analysis  
and Optimization  
Money Management  
Solutions  
Risk Management  
Solutions  
Life Insurance  
Annuities  
Long Term Care  
Insurance

**INNOVATIVE**  
**COLLEGE FUNDING SOLUTIONS**

## FINDING MONEY FOR COLLEGE & MAXIMIZING FINANCIAL AID

Asset Repositioning  
FAFSA and CSS Profile  
Form Preparation  
Financial Aid Appeals  
Alternative Funding  
Solutions  
Student Coaching and  
Positioning  
School Selection  
Scholarship Assistance  
College Planning Network  
Members & Advisors