



**Bonadio services offered:**

Accounting & Auditing

Business Advisory

Enterprise Risk Management

Tax Planning & Compliance

Personal & Family Finance

For more information, visit **bonadio.com** or call **888.997.2494**.

How We Assist...

# INDIVIDUALS

Personal tax strategies, financial planning, and wealth management.

Are we experts at keeping clients' tax liability as low as possible? Of course. But there's so much more to your financial life than tax planning and preparation. Working with you on your taxes every year gives us a close, multifaceted look at who you are and what you want to accomplish. And whatever facet you consider, the bottom line is most often peace of mind—from wealth management to estate planning.

At Bonadio, we have a specialized team who focuses on the needs of individuals—and can look at your entire financial picture to find ways to help you grow and protect your assets. When you lean on a fully integrated staff of experts in every aspect of your financial life, you get the benefit of their shared knowledge, unique strengths, and collaborative spirit. In today's complex financial environment, that's what it take to make everything come together just right. Your investments. Your estate. Your retirement.

**Trusted advisors: A personal interest in every individual we serve.**

We built our reputation by first building longstanding relationships that help us deeply understand your unique needs and goals. You get access to an outstanding team of accountants, certified financial planners, wealth managers and insurance and investment specialists. And they deliver objective, timely advice untainted by allegiances to financial institutions and proprietary investment brands. Our work, our priority, and our first allegiance: you.

**Bonadio works with individuals in every kind of situation, at every stage of life.**

<b>If you're an investor...</b>	We can take a fresh, impartial look at your portfolio and make asset allocation recommendations to you.
<b>If you're a high-net-worth individual...</b>	We have a unique Personal CFO program that connects you to a single, dedicated financial expert available for every imaginable financial consideration.
<b>If you're a business owner...</b>	We can help you build a confident succession plan so you can rest easy, knowing your transition out of the business will be smooth and stable.

Big firm capability. Small firm personality.

## THE BONADIO GROUP

CPAs, Consultants & More

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