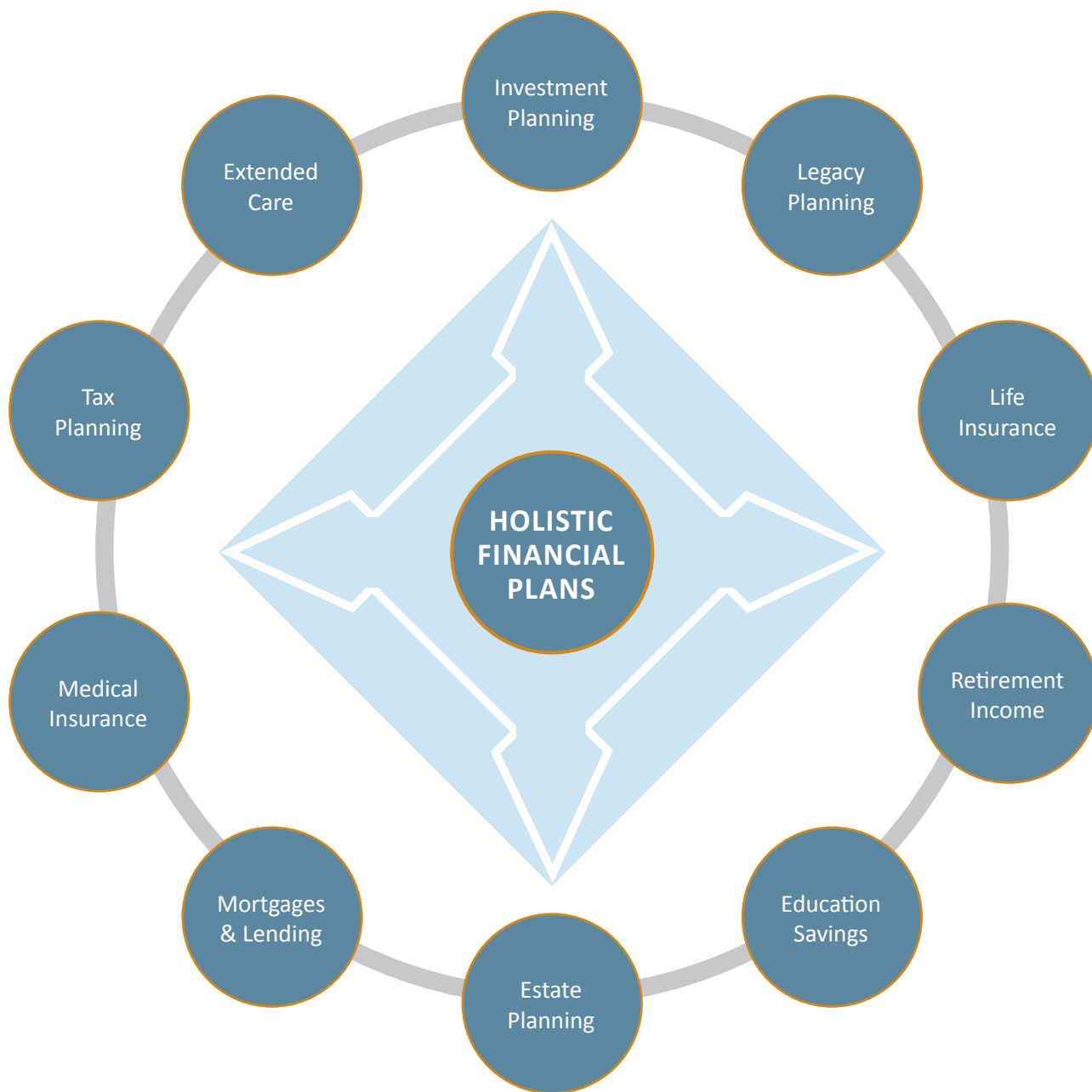




FORT PITT[®]
CAPITAL GROUP

WHAT WE OFFER INDIVIDUAL INVESTORS



FORT PITT[®]
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The Key to Achieving Your Goals

A HOLISTIC FINANCIAL PLAN

INVESTMENT PLANNING	It starts with an intimate understanding of your goals, priorities and tolerance for risk. We take the time to understand you, so we can develop an investment plan that fits.
RETIREMENT INCOME	When you retire and take that last official paycheck, our goal is to make sure that the assets you have accumulated will continue to provide the regular income you need. Your Income Plan is a part of your overall plan.
EDUCATION SAVINGS	Paying for college is among the largest investment that most families face. We help you navigate 529 Savings Plans, Coverdell ESAs (formerly known as Educational IRA), Custodial Accounts and Trusts.
LEGACY PLANNING	We have multidimensional planning conversations, which can lead to discussing a legacy that will impact who and what is most important to you.
INSURANCE	We will discuss insurance and how it fits into your larger financial plan from both the standpoint of protecting your assets and providing for the most important people in your life. If insurance is something that you need, we can point you in the right direction so that you can make informed decisions with your advisor by your side.
ESTATE PLANNING	We address complicated estate planning questions directly with your legal counsel creating a coordinated effort focused on your unique needs.
MORTGAGES & LENDING	Through our bank partners, we can offer mortgage and lending solutions for your home or business needs.
MEDICAL INSURANCE	One of the most confusing aspects of retirement is figuring out healthcare options. We can help you choose a broker or agent, then work with them to evaluate your options and recommendations.
TAX PLANNING	While we do not provide tax advice, we can bring together expertise on your behalf, working with your accountant to make the most tax-efficient financial strategy.
EXTENDED CARE	Helping you navigate potential life events that could affect income and housing needs is integral to our holistic planning approach. In addition to exploring ways to protect your assets, we can provide support and guidance to put your mind at ease.

Let's Get Started



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