



# CIRCLE OF SERVICES

## BUSINESS PLANNING

- Executive Compensation Plans
- Qualified Retirement Planning
  - 401(k) Plans
  - SEP
  - Simple IRAs
  - 412(i) Plans
- Business Continuation

## PERSONAL PLANNING

- Personal Insurance
- Retirement Planning
- Wealth Management Solution
- College Plans

## EAGLE STRATEGIES, LLC.

*A Registered Investment Adviser*

- Financial Advisory Services  
Tim C. FitzGerald, MSFS, AEP,  
*Financial Adviser\*\**
- David Q. Kendrick, LUTCF,  
*Financial Adviser\*\**



CLIENT

## TFG FINANCIAL GROUP BENEFITS

- Group Health Insurance
- Group Life Insurance
- Group Disability
- Group Dental
- Group Long Term Care
- Employee Personal Planning

## THE NAUTILUS GROUP\*

*A service of New York Life Insurance Company*

- Estate Planning
- Business Succession
- Charitable Planning

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