Personalized Process — How BPU Works With You

Your financial advisor is your personal contact, the one who understands your goals and life situation, oversees and manages your strategies and answers your questions. He or she also serves as your liaison to BPU's team of credentialed professionals including: Chartered Financial Analysts, Attorneys, Accredited Investment Fiduciary Analysts™, and CERTIFIED FINANCIAL PLANNER™ Practitioners.

Together, these experienced professionals gather and analyze your information to create a comprehensive *life balance sheet* that encompasses your assets and liabilities; income and expense; and, other factors that affect your life and financial planning needs, including health, family dynamics and more. This planning process often includes recommendations regarding:

- Cash Management
- Debt Structure
- Tax Planning
- Investments
- Retirement Plans
- Deferred Compensation
- Retirement Income Planning
- Risk Management
- Asset Protection
- Legacy Planning

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trust