

MENU OF SERVICES

LIFETIME WEALTH STRATEGIES 9700 BUNSEN PARKWAY, LOUISVILLE, KY 40299 502.267.5433 IFETIMWEALTHSTRATEGIES.NET

INVESTMENT MANAGEMENT

Portfolios built with specific goals in mind:

- Risk Managed Portfolios
- Values Based Portfolios
- Individual Equity Strategies
- Goal-Based Investment Portfolios



FINANCIAL PLANNING

A comprehensive process that develops strategies for all parts of your financial picture, not just your investments.



INSURANCE PROTECTION

Protecting what you have worked hard to build:

- Life Insurance
- Disability Insurance
- Long Term Care



BUSINESS PLANNING

Time to make your business work for you.

- Succession Planning
- Employee Retirement Plans
- Key Person Retention Plans

