



# Proxy Wealth

## Small Business Solutions

---

Program for Small Business Partners



## Dear Business Owner

At Proxy, we go beyond traditional solutions by offering small businesses a unique partnership to foster trust and growth over time. Our tailored services cover the entire lifecycle of each business, ensuring a lasting and evolving relationship.



## Our Planning Process

Understand your business reality.

Establish the current picture and future vision to help create tangible goals aligned with your life.

Utilize efficient tools to maximize tax savings.

Monitor markets and make changes to stay on the right path.

Minimize costs to achieve your goals.



YOUR BUSINESS



PROXY

FINANCIAL



# ■ Our Mission: WEALTH DONE BETTER

As a business owner, we understand the challenges of high taxes. Proxy empowers business owners to reduce their tax burden while retaining talent. Our mission is to provide tools that allow you to have your cake and eat it too. Explore how we help small businesses achieve their goals, offering peace of mind and a roadmap to success.



## ■ Our Core Services



### **Business Planning**

Our team of Financial Planners specializes in understanding the specific needs of businesses and their owners. From comprehensive consulting to plan architecture, Proxy allows you to focus on your craft while we ensure the protection and growth of your creations.



### **Benefits, Bonuses & Deferred Compensation**

Customized executive and employee benefits to retain great talent, defer taxable revenue, and plan for the future. From 401(k) to pension plans, Proxy covers it all, ensuring your business thrives while planning for long-term success.



### **Healthcare Solutions**

Experience the gold standard in health insurance with Proxy. Our partner providers work on a value-add basis, ensuring lowered healthcare premiums for the same coverage. Simplify the process with one conversation and focus on what matters most – your business.



### **Protection Planning**

Customized insurance strategies tailored to the unique needs of your small business. Proxy takes a general agency approach, understanding that each business is different and requires personalized protection planning to safeguard your bottom line.



### **Succession Planning**

Plan for the future of your business with Proxy. Whether selling or passing it to the next generation, our sound succession planning ensures optimal success in this crucial step of a business owner's life.



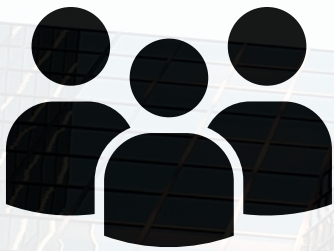
# ONLINE PLANNING PORTAL

With our user-friendly online planning portal, managing your savings and investments has never been more seamless. Experience the convenience of tracking your financial portfolio effortlessly, all within a single login.



# THE POWER OF TAX DEFERRAL

As a business owner, we understand taxes can be complicated. Like most other business owners, you're actively looking for ways to reduce your tax burdens. Proxy can help steer you towards those goals.



YOUR BUSINESS



INFINITE BANKING FOR OWNERSHIP Unlimited

EXECUTIVE BONUS PLANS Unlimited

CASH BALANCE PLAN Up to \$398,000

PROFIT SHARING Up to 4% of Total CB

401(K) \$22,000 (\$30,000)

SEP IRA Up to \$66,000 or 25% of Compensation

IRA \$6,500 (\$7,500)



## ■ FINANCIAL WELLNESS

Build healthy, financial habits that drive long term results including: systematic savings, tax strategies, and having an emergency fund for uncertain times. We can host private wellness workshops along with access to the group content.



## ■ Monthly Marketing Topics

By intertwining our marketing topics with key financial themes, we aim to establish relevance and resonance with our audience's current interests and concerns.

MONTH	VIRTUAL EVENT THEMES
January	Portfolio Reviews
February	Small Business Planning
March	Tax Season for Individuals
April	Back to Basics
May	Retirement Income
June	Beneficiary Month
July	Maximizing Your Money
August	Know Your Community
September	Life Insurance Awareness
October	Planning Awareness
November	Giving Season
December	RMD & Biz Contributions







PROXY

FINANCIAL

[WWW.PROXYFINANCIAL.COM](http://WWW.PROXYFINANCIAL.COM)