

# FAULKNER FINANCIAL, LLC

*Serving Non-Profit Organizations, Clients and Community*

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## **Charitable Giving**

- Planned Giving Seminars
- Strategies to educate individuals how to give to your organization
- Charitable Remainder Trust
- Tax-advantage Distributions from IRAs for Charitable Purpose
- Life Insurance Strategies

## **Special Needs Planning**

- Preparing Families for the Future
- Special Needs Trust Funding
- Retirement Strategies
- Disability Income Insurance

## **Our Services**

## **Estate Planning**

- Asset Protection Strategies
- Trusts Company Services\*\*

## **Asset Management**

- Estate Preservation
- Asset Protection Strategies
- Gift and Estate Tax Reduction Strategies

## **Employer/Employee Benefit**

- Tax Sheltered Annuity (TSA) Products
- Group Disability and Life Insurance\*
- Group Health Insurance\*
- Personal Needs Analysis Review
- Executive Benefits
- Financial Workshops

\*Not offered through MassMutual.

\*\*"Trust services offered through The MassMutual Trust Company, FSB