Merrithew & Thorsten, Inc.

Left to right: **2016 winners Les Merrithew**, CFP®, EA, and **Brandon Thorsten**, M.S., CFP®, EA; **Somer Gates**

Helping People Through Life's Transitions

Full comprehensive, integrated financial planning, including:

- Portfolio/wealth management
- Retirement planning/projections
- Tax preparation and planning
- Business planning and taxation
- Estate planning (wills and trusts)
- Fee-only, no sales or commissions
- Over 55 years' combined experience

Our holistic approach ensures that our clients' financial plans are complete and integrated. It is not sufficient to have only a well-structured investment plan. Investment decisions must take into account careful tax planning as well as estate and insurance planning. All of our recommendations take into consideration the effect that they will have on all other aspects of our clients' financial lives. In addition to a complete, integrated plan, we work with our clients on an ongoing basis to proactively manage that plan. A financial plan is not static. A financial plan should not be a one-time, hardbound snapshot. A true financial plan is dynamic. It is constantly evolving.

MERRITHEW & THORSTEN, INC.
Fee-Only Financial Advisors

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