



Working with you, for you

Investments

Stocks
Bonds
Mutual funds
General securities
Variable products
Variable life

Financial Planning

Fee-based services
Quality Life Plans™
Asset management
Retirement plans (Roth and traditional IRAs, etc.)
Portfolio analysis
Business planning

Client Education

Informational workshops
Newsletters
Client website
Monthly market updates

Asset Management

Estate and philanthropic planning
Alternative investments
Liability/liquidity management

Taxes

Through CPA and accountant alliances
Tax preparation
Online filing
Client and business consulting

Employee Benefits

Medical, dental, vision
Short- and long-term disability
Qualified pension plans
HSA plans
401(k), 403(b), 457 plans

Legal Assistance

Through legal alliances
Wills/trusts probate
Durable powers
Estate planning
Elder law

Insurance

Asset and income protection
Life insurance
Disability insurance
Long-term care
Annuities
Auto insurance
Home insurance

College Planning

FAFSA filings
Scholarship search
Grant writing support
College cost comparisons



To learn more about Gateway Financial Advisors, Inc., contact

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