FAUBOURG
PRIVATE WEALTH

Our Comprehensive Suite of Services

Everyone's financial journey is unique. That's why we've developed a comprehensive list of solutions, built to adapt to your needs as they evolve. Whether you need guidance on just one of the following topics or some combination of them, we work with you to craft a unified, bespoke solution.

Financial Planning

Wealth accumulation

- Non-retirement saving strategies
- Employer stock options strategies / NUA

Retirement planning

- Multi-decade projections
- Savings targets
- Distribution strategy

Tax planning

- Roth conversions
- Retirement distribution strategy
- Required minimum distribution (RMD) planning

Risk management

- Life insurance
- Long-term care

Estate planning

- Generational wealth transfer
- Lifetime gifting arrangements
- Attorney interface
- Charitable giving

Business planning

- Exit strategy
- Liquidity events

Investment Management

- Investment strategy consolidation
- 401(k) rollovers
- Cash management
- Inheritance investment strategy
- Collateralized lending against investment portfolios
- Tax-loss harvesting
- Protection for over-concentrated equity positions

Employer-Sponsored Retirement Plans

For plan sponsors

- Fiduciary guidance (3(21) or 3(38))
- Fiduciary services, support & education
- 401(k) and 403(b)
- Plan design consulting & compliance assistance
- Provider analysis & benchmarking
- Investment monitoring & due diligence
- Plan governance & documentation
- Plan administration support
- Cash balance & profit sharing

For plan participants

- On-site financial wellness education
- Personalized retirement planning
- Enrollment & communication campaigns

Ongoing plan management

- Annual plan reviews
- Compliance & regulatory updates

Ready to take the next step?

Visit us at **fpwa.com** or contact us at **(504) 321-0923**.