
















LET'S WORK TOGETHER

At **Altfest**, we provide guidance for life. From helping manage student debt after starting a new career, to advising on the best succession plan before retiring, we're there for our clients through every stage of their lives. Wherever you're headed next, let us help you get there.

Early Career	Mid-Career	Pre-Retirement	Retirement
 Student Debt Management			
 Maximize Employer/Employee Benefits			
 Expense Management			
 Savings Plan			
 Major Purchase Planning (home, car, etc.)			
 Tax Planning			
 401(k), 403(b) & IRA Account Management			
 Insurance & Risk Management			
 Recommend & Coordinate Outside Advisors (accountants, attorneys, etc.)			
	 Business Ownership & Succession Planning		
	 Children's Education Funding		
	 Estate Planning		
	 Supporting Family		
		 Social Security Optimization	
		 Charitable Giving	



Personal Wealth Management
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