



### **Protect Your Client's Wealth**

Taxes can carve out up to 55% of what your clients have worked so hard to earn, if their estate is not properly structured.

**Complete Estate Design Analysis and Review System (CEDARS)** offered by Strategic Marketing.

This program includes and offers:

#### **✓ Use the CEDARS Certified Fact Finder**

- Detailed client information is essential for appropriate recommendations

#### **✓ Our expert team goes to work**

- Completes the analysis including attorney review

- Makes comprehensive recommendations

- Provides detailed illustrations

#### **✓ Present recommendations to the client** (we can assist you when needed)

#### **✓ Solutions are customized to clients' goals**

**Great for referrals**

**Joint case work available**

Expect to see high closing rates and, most importantly, the opportunity to truly meet your clients' needs. CEDARS will result in more happy and loyal clients.