



SHORE MORGAN YOUNG
Wealth Strategies

YOUR FAMILY NEEDS TO KNOW:

- ... after a lifetime of work, you are properly positioned for a long and secure retirement ...
- ... the cost for your future health care is carefully managed as time marches on ...
- ... your standard of living will survive shared adventures and misadventures ...
- ... your children and grandchildren enjoy a head start on the future ...
- ... you can help support others you cherish in time of need ...
- ... your legacy belongs to whomever it is you choose ...
- ... an enhanced standard of living is an option ...
- ... the annual tax bill isn't more than it should be ...
- ... your financial life is organized, intelligent and readily accessible ...
- ... life's treasure is always abundant, despite modern financial complexity ...
- ... if something happens to you, a resource for financial decisions remains ...
- ... action is required before events transpire — and we'll help you see it to completion ...

*Your time is your most valuable resource.
We realize that we will never become a part of your everyday.
You, however, will be central to ours.*

*Shore Morgan Young Wealth Strategies has helped families
find answers for over three decades, while providing
more time and less complication to enjoy their days.*

OUR PRINCIPALS



LEW SHORE



JON MORGAN



MARYA YOUNG

{ Nationally Recognized }

AREAS OF CONCENTRATION

FINANCIAL INDEPENDENCE

Developing a plan to ensure security in later years

INVESTMENT MANAGEMENT

Designing a portfolio to build and retain wealth

ESTATE PRESERVATION

Preserving assets to provide a legacy for the future

RISK MANAGEMENT

Using financial strategies to mitigate life events

PRIVATE WEALTH MANAGEMENT SERVICES

Our premier team — focused on your financial objectives

Wealth Accumulation: Choosing the right investment may be one of the hardest decisions you will have to make. Learning about the various investment vehicles available today and how they can help you meet your objectives plays an important role in your financial future.

Retirement Planning: We all aspire to enjoy our retirement years without financial concerns. Planning adequately can help ensure security and provide for the necessary income distributions to maintain your desired lifestyle throughout retirement.

Business Succession: Building a business takes smart planning, determination and hard work. A solid succession plan helps to ensure that your prospering business will transfer to future generations.

Education Funding: Education costs are rising, with no end in sight. Stay alert to the best way to pay for education — for yourself, your children or your grandchildren.

Risk Management: Life and disability income insurance play a vital role in helping us manage the risks we face daily. They can also provide funds to facilitate the transfer of a business or other assets to a family member.

Income Tax Considerations: There are many areas to consider when choosing an investment, filing a tax return or entering into any major financial transaction. Planning ahead may help reduce or avoid some tax pitfalls.

Estate Planning: By planning appropriately, estate taxes and transfer fees can be minimized or eliminated and your legacy will more effectively and efficiently transfer to your desired recipients.

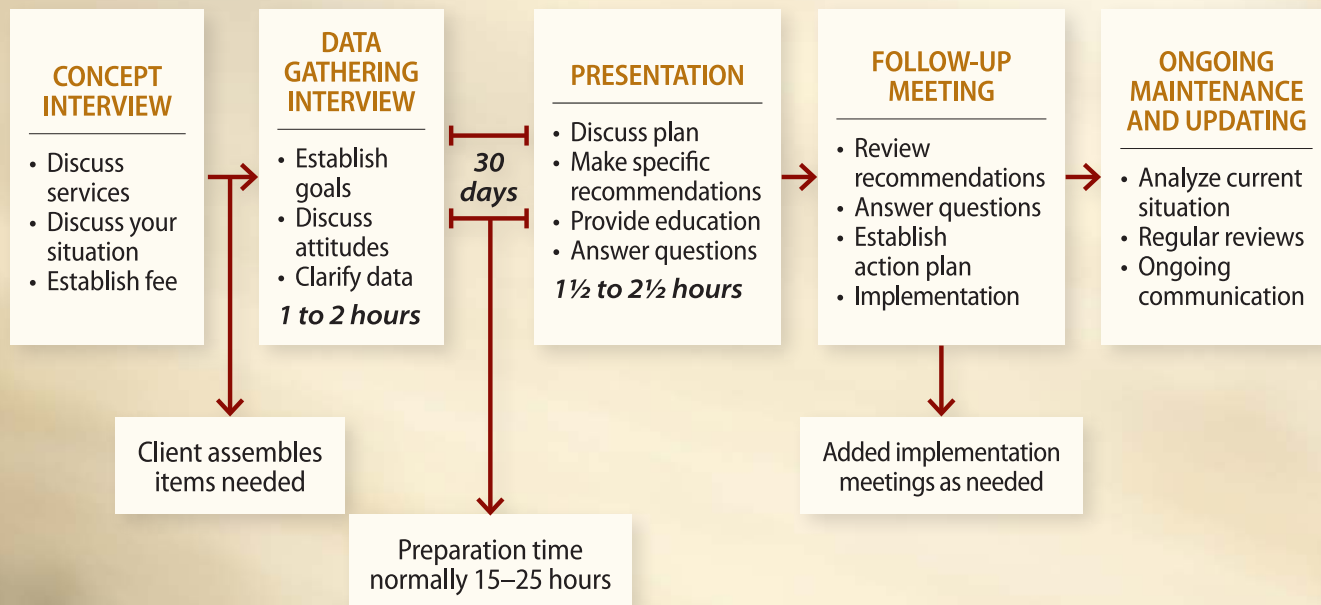
Employee Benefits Review: You need to understand your options and the impact your choices may have.

Mortgage Loan Analysis: For most families, a home is the largest lifetime purchase, and the mortgage for that home is the largest lifetime debt. Understanding the various options can make a real difference in the cost of a mortgage.

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shoremorganyoung.com,
to sign up for our
Financial Education
email alerts!*



WEALTH MANAGEMENT PROCESS



ITEMS NEEDED FOR PLANNING

- Family Information
- Summary of Assets, Liabilities and Living Expenses
- Federal Income Tax Return
- Mortgage Statement
- Most Recent Paycheck(s)
- Investment Account Statements (brokerage, bank, annuities, retirement, etc.)
- Employee Stock Option Schedules and Employer Benefits Booklets
- Insurance Policies (life, disability, and long term care)
- Estate and Legal Documents



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