

HIGH NET WORTH PLANNING SERVICES



COMPREHENSIVE WEALTH STRATEGIES FOR HIGH NET WORTH INDIVIDUALS

As your financial landscape grows in complexity, our tailored approach ensures every facet of your wealth is working in harmony. We provide the expertise needed to navigate difficult decisions, allowing you to focus on your professional legacy while we secure your personal future.

HIGH NET WORTH PLANNING

At Jumet Financial we work closely with high-net-worth clients to help grow and protect their wealth while making the most of opportunities along the way. We provide the expertise needed to navigate decisions, allowing you to focus on your professional legacy while we secure your personal future.

EXECUTIVE COMPENSATION

Maximize the value of your compensation through strategic management of Employee Stock Options and Restricted Stock Units. We help you navigate vesting schedules, manage concentration risk, and optimize the timing of exercises to align with your broader financial goals.

TAX EFFICIENT STRATEGIES

Minimize tax liabilities by using strategies like tax-loss harvesting, utilizing tax-advantaged accounts, and timing income or capital gains. We help to coordinate with estate and trust planning to preserve wealth across generations.

ESTATE PLANNING

Provide estate planning strategies to preserve wealth, minimize tax exposure, and ensure your assets are transferred seamlessly to future generations in alignment to your long term objectives.

CHARITABLE GIVING

Support the causes most meaningful to you through charitable giving. We assist clients in establishing and administering endowment funds and charitable trusts as part of a comprehensive wealth and legacy planning strategy.

INVESTMENT MANAGEMENT

We tailor investment allocations to align with your specific objectives and priorities. This may include implementing tax-efficient strategies, incorporating socially responsible initiatives, and ensuring appropriate diversification across asset classes.

BUSINESS PLANNING

We advise business owners on strategies designed to support long-term retirement planning. Our services include establishing business investment accounts, implementing tailored investment strategies, and providing guidance on budgeting and cash flow management.

www.jumetfinancial.com

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