

BEAIRDHARRIS
CPAs & Wealth Managers

Integrated Wealth Management + Tax Planning

INDIVIDUALS AND FAMILIES

Investment Management + Financial Planning + Risk Management + Estate Planning + Tax Planning & Preparation



Wealth Management + Tax Planning Centered Around You

As a fee-only Wealth Management and Certified Public Accounting firm, Beaird Harris understands the unique challenges high-net-worth individuals and families face when dealing with their finances. We offer proactive wealth management and tax solutions to help grow, protect, and preserve your wealth across generations.

From short-term needs to long-term objectives, we help you navigate the uncertainty of shifting markets and ever-changing tax regulations. While not required for our wealth management clients, many value the simplicity of working with a single enterprise to integrate wealth management and tax for a fully coordinated solution. Our integrated approach to wealth management and tax planning has one principal objective: to bring order to the financial turbulence around you, allowing you to feel more confident and focus on the things in life that matter most.

The scope of services provided depends upon the terms of the engagement and the specific requests and needs of the client. Beaird Harris does not serve as an attorney or insurance agent. Beaird Harris does not prepare legal documents, nor does it sell insurance products. If the client engages us to do so, Beaird Harris can provide tax preparation services through our CPA affiliate, Beaird Harris, PLLC, subject to a separate engagement and fee.



We Put Your Interests Ahead of Our Own

As fee-only advisors, Beaird Harris does not receive benefits from brokerage services, commissions or finder's fees, allowing us to remain impartial and deliver objective fiduciary advice.

This complete independence is one of our foundational strengths and a critical driver of our clients' success. Unlike so many who call themselves financial advisors or wealth managers, we truly are unencumbered to choose the most appropriate investments without any external factors influencing our decisions.

HOW WE'RE DIFFERENT

- We don't sell any products.
- We don't receive any form of compensation from anyone other than our clients.
- Our advice is given in the best interest of our clients, not our bottom line.
- With a full staff of CPAs, we are in a favorable position to fully consider the tax ramifications of every investment decision, as well as offer tax planning and preparation services.

Beaird Harris WealthGuide℠ Planning Process



FINANCIAL PLANNING

INVESTMENT MANAGEMENT

RISK MANAGEMENT

ESTATE PLANNING

TAX PLANNING

Clients trust Beaird Harris to diligently oversee their investment portfolios and protect the wealth they have worked a lifetime to accumulate.

What makes Beaird Harris unique is our ability to manage multiple goals for the benefit of our clients. Integrated financial planning, investment management, risk management, estate planning, and tax planning are the foundation of our Beaird Harris WealthGuide℠ planning process.

Whether you're in the midst of your peak earning years, approaching retirement, addressing your legacy or preparing for a major life change, our integrated planning process aligns your short-and long-term goals with personalized strategies to help you achieve financial peace of mind.





Your Road Map to Financial Peace of Mind

Like any good road trip, your path to financial success may take you in any number of directions. Our Beaird Harris WealthGuide℠ planning process serves as a road map to financial peace of mind. With decades of experience and the latest tools, we work with you to help build long-term wealth and provide continuous guidance and oversight to keep you on track.

1 WE LISTEN

- Summarize what's most important to you
- Clarify, organize, and prioritize your goals and objectives

2 WE REVIEW YOUR CURRENT SITUATION

- Organize & analyze existing investment portfolio
- Assess current tax and financial situation
- Assess risk management and asset protection strategies
- Assess estate planning strategy
- Identify opportunities

3 WE CREATE A PLAN

- Conduct retirement needs assessment
- Complete personal risk assessment
- Deliver plan and portfolio recommendations
- Develop tax planning strategies

4 WE IMPLEMENT & COORDINATE

- Execute financial planning strategies
- Implement asset allocation strategy
- Coordinate risk management, estate planning and asset protection strategies

5 WE COMMUNICATE, MONITOR & ADJUST

- Reevaluate your financial plan, tax situation and confirm investment strategy
- Reassess what's important, review progress and update plan as needed

Offering More Than Just Investments

Integrated Wealth Management + Tax Planning Services

FINANCIAL PLANNING

Financial planning involves comprehensive wealth management, integrating all aspects of your finances. It covers saving, investing, spending, retirement, taxes, estate planning, and risk management to achieve your goals efficiently.

- Retirement Feasibility Analysis
- Cash Flow Modeling
- Social Security Optimization
- Medicare Planning
- Required Minimum Distributions
- Pension Maximization
- Education Planning

INVESTMENT MANAGEMENT

We employ a disciplined scientific investment strategy focused on a broad global diversification, sound asset allocation principles and a goal of recommending the appropriate level of investment risk required to achieve your objectives.

- Asset Allocation
- Asset Location
- Evidence-Based Philosophy
- Globally Diversified Portfolios
- Structured Asset Class Portfolios
- Low-Cost & Tax-Efficient
- Risk Return Analysis
- Concentrated Position Analysis
- Stock Option Analysis



RISK MANAGEMENT

Having the right insurance coverage and asset protection strategies in place can mitigate the financial impact of unforeseen events. While we don't sell insurance, we will help you understand your current level of exposure, and recommend strategies to mitigate and manage these risks effectively.

- Insurance Review
- Life, Disability & Long-Term Care
- Home, Auto & Umbrella
- Professional Liability
- Alignment with Employee Benefits
- Asset Protection Strategies

ESTATE PLANNING

While it's a topic many shy away from, proactive planning is vital. Estate planning helps ensure your wishes are followed. At Beaird Harris, we cherish that notion, and guide you through a review of your plan to help ensure it is custom tailored to you.

- Estate Structure & Strategy Review
- Asset Titling Coordination
- Beneficiary & Estate Coordination
- Philanthropic Planning & Gifting Strategies
- Multigenerational Family Meetings
- Estate Administration Support
- Wealth Transfer

TAX PLANNING & PREPARATION*

The complex nature of tax laws and the high cost of failing to comply with an ever-changing set of regulations make the need for professional tax assistance clear. Our CPAs implement detailed tax optimization strategies that fit your needs.

- Tax Planning & Strategy
- Tax Return Preparation
- Federal Income Tax
- State & Local Tax
- Trust & Estate Tax
- Corporate Tax
- Family Limited Partnerships

*While it is not required to use both firms, many value the simplicity of working with a single enterprise to integrate wealth management and tax for a fully coordinated solution.

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Your Success Is Our Success

Our integrated approach to wealth management and tax planning helps provide peace of mind - allowing you to focus on the things that matter most: living a happy, healthy and meaningful life.

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BEAIRDHARRIS
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Schedule a complimentary call with us today!

*No guarantees are being made that you will experience any specific result. Investing in securities involves the risk of loss. Tax, Accounting, Business Consulting and Business Advisory Services provided by Beaird Harris, PLLC, a Certified Public Accounting Firm. Investment advisory services provided by Beaird Harris Wealth Management, LLC., an investment adviser registered with the SEC. References to Beaird Harris refers to either or both entities, as applicable.