


1847Financial[®]



Building and protecting
our clients' wealth
for their lifetime and
future generations.

610 - 440 - 0458



1847lehighvalley.com

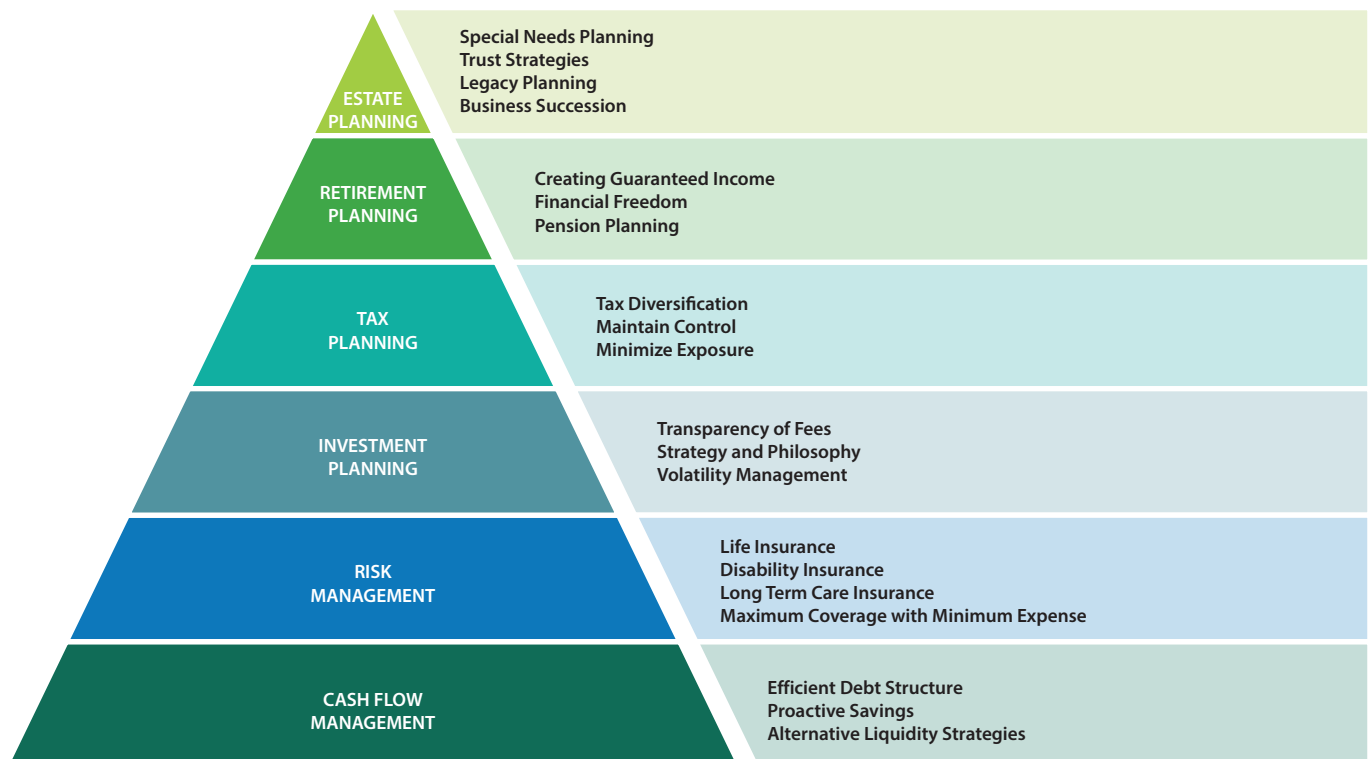


Mission Statement

At 1847 Financial, our mission for the families and business owners we serve is to provide an effective, economically-based process that maximizes their protection and builds income streams in retirement, while reducing risk to their financial future. We strive to be the most trusted advisors and resource for our clients. We embrace holistic planning to make sure all areas of one's financial game plan are coordinated. Our integrative team approach will engage the intellectual capital of our firm to provide guidance throughout the entire planning process - helping you leave a legacy for one generation to the next.

Core Values

- We believe promises made are promises kept.
- We believe in being transparent, authentic, and fair.
- We believe the client experience is everything.
- We believe everyone needs a road map.



Our Team



Pictured left to right: Jacob Crawford, Luke Laubscher, Cory Thatcher, Colton Schafer, Jay Verish, Craig Schafer

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Our Process

Navigating the complexities of family and institutional planning can be challenging. No two paths are the same. That's why we partner with 1847's Advanced Planning resources to develop forward thinking strategies that will help navigate our clients through any planning they face.

There are two types of planning: Core and Advanced. Core planning establishes the basic building blocks for a family or business. Advanced planning establishes, or reinforces the core, then customizes additional solutions to meet the unique needs of the client. Advanced planning is the universe of options for customizing a core plan, adding dimension and scope.

We offer turn-key tax planning, wealth transfer, estate planning, retirement income and charitable giving strategies as well as group benefits. These services assist families and their advisors as they seek to initiate the planning process or build "additions" on an already significant set of planning strategies.

Your Circle of Advisors



Our Process

Our wealth management system allows you to connect all of your financial accounts into a single, secure tool. Using the wealth management portal, we'll work together to build a plan that will organize your financial life, allowing you to stay connected to your finances and your financial advisor.

Engage and collaborate by utilizing different aspects of this program, such as the education center, which provides articles and e-books on just about anything you'd like to learn. Your customized profile can also help you keep track of your goals and objectives.

1847 Personal Financial View

Home Page

Here you will see a summary of your financial world. Your current net worth, investments, protection and spending/budgeting all neatly organized so you can understand your wealth.

Workshop

Interactive sliders in the workshop help you assess your financial situation. See what choices will impact your overall plan.

Education Center

In the education center, you can choose from a wide variety of e-books and articles that cover any topic you could possibly want to learn more about.

The Vault

Our clients use the vault in a variety of ways. Store important financial documents such as wills, trusts, birth certificates or other personal items like pictures and video messages.

Organizer

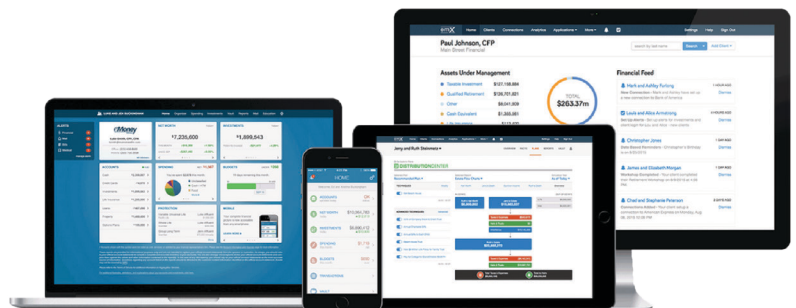
Here you can enter all of your accounts, such as checking, savings, credit cards, mortgage, insurance and retirement accounts. Your plan is only as good as your data!

Investments

In this section, you will be able to track all of your investments, review your asset allocation and track your performance.

Decision Center

We like to call it your "Dream Board." Once we have a firm grasp on your core goals and objectives, we can help you start to dream about the things that are important to you.





Areas of Expertise

Individuals

- Estate Planning, Wills, Medical Directives, Power of Attorney
- Property and Casualty Insurance, including Umbrella Policies
- Maximizing Retirement Plan Strategies
 - Best strategy for your specific situation
 - Exit Strategy with Retirement Assets
 - Income Streams in Retirement
- Life Insurance, Disability Insurance, Benefits Review
- Advanced Tax and Charitable Planning
- Review and Advise on Debt Structure
- Social Security Review
- Review for Tax Efficiency (Tax Harvesting)
- Overall Advisor Coordination
- Strategic Wealth Management
- Customized Distribution Strategies

Businesses

- Review Group Benefits: Health, Life, Disability, Dental
 - Succession Planning, Exit Strategies, Buy-Sell Agreements, Insurance Policy Review
 - Key Man/Person Planning
 - Business Valuations (BizEquity)
 - Retirement Plan Review:
 - Department of Labor
 - Compliance
 - Fee Analysis
 - Investment Options
 - Actuarial Design
 - Employee Retention Planning
 - Employment Agreements
 - Debt Structure Analysis
 - Non-Qualified Deferred Compensation Plans
 - Business Plan Consultation
 - Review Property and Casualty Policies, including Worker's Compensation Policies
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Our Offices

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