PRIVATE CLIENT
ADVANCED PLANNING

For Business Owners & High Net Worth Families with Complex Wealth Structures

Advanced planning is not a collection of isolated strategies. It is deliberate coordination across income, enterprise value, taxation, and multi-generational wealth transfer.

COMPREHENSIVE WEALTH STRATEGY

Enterprise-level coordination across your financial life

- Integrated Wealth Strategy Development
- Investment Oversight & Risk Alignment
- Advanced Retirement & Distribution Planning
- Ongoing Planning Oversight
- Governance & Decision Framework Design

ADVANCED RETIREMENT PLANNING

Strategic income distribution across decades

- Tax-efficient Distribution Modeling
- Retirement Income Architecture
- Liquidity Sequencing Strategy
- Intergenerational Wealth Structuring
- Concentrated Wealth Transition Planning

TAX & BUSINESS PLANNING COORDINATION

Aligning enterprise value with personal financial independence

- Tax Strategy Coordination
- Business & Liquidity Event Planning
- Executive & Concentrated Wealth Strategies
- Advanced Compensation Structuring
- Pre-sale Wealth Optimization

ESTATE, RISK & LEGACY STRATEGY

Protecting capital and preserving multi-generational intent

- Estate & Legacy Coordination
- Insurance & Risk Management Strategy
- Philanthropy & Impact Planning
- Intergenerational Wealth Planning Design
- Succession Alignment

Starting at $7,500 ($625/mo for 1st year) | Ongoing Advanced Planning Starting at $500/mo after 1st year

Cooper White and Associates, LLC

*Financial Planning That **Performs***