

A Full Year With J.E. Simmons and Company

What we handle for owners in each area, every year.

Personal

- Confirm your estate plan still matches your wishes.
- Update your retirement plan and savings targets.
- Identify and close gaps in insurance and benefits.
- Confirm contributions are made and action items done.

Portfolio

- Watch your portfolio, so you never have to.
- Capture tax savings as markets move.
- Manage cash so it's there when you need it.
- Keep risk matched to your goals.



Business

- Review the books and set owner compensation.
- Benchmark your numbers against your peers.
- Forecast the year's results and build the tax plan.
- Model major decisions before you make them.

Tax

- File your returns and coordinate estimated payments.
- Proactively look for tax-saving opportunities.
- Forecast your taxes while there is still time to act.
- Handle year-end planning before the window closes.

One independent, fiduciary team across your business, taxes, portfolio, and personal plan, all year, with one goal: **to improve your life.**