Chambers Wealth Management Services

Financial Planners
World Class Concierge – Level Client Services

1800 Chapel Ave West, Suite 200, Cherry Hill, NJ 08002
Office: 856-488-2843
Cell: 609-471-9966
Donald.Chambers@lfg.com

"Determine that the thing can and shall be done, and then we shall find the way." –Abraham Lincoln

While it may be enough to provide you with a comprehensive, integrated financial strategy, at Chambers Wealth Management Services we feel the need to go one step further in order to provide a truly unique experience. Therefore, we have developed World Class Client Service that we believe to be without equal in our industry. Our services include:

- **Annual Comprehensive Financial Review**
  - Personal Financial Plans, Estate Plans and Retirement Plans are reviewed and updated as needed*
  - Comprehensive review of financial needs, goals, and objectives.
  - Comprehensive review of risk tolerance.
  - Comprehensive review of changes in personal, family, career, and business situations.
  - All documents, profiles, and data are reviewed and updated annually.
  - Alternative actions from attorneys, accountants, or other financial providers may be requested.
- **Platinum Service Performance Review**
  - Portfolio performance, including fund managers, is reviewed face-to-face on a quarterly basis.
  - Quarterly performance reports are mailed.
  - Any changes or updates to your current situations are discussed.
  - Annually, your overall investment performance is measured and compared to both standard indices and the goals of your financial strategy.
- **Exit Strategy for Closely Held Business**
  - Buy-Sell Agreements
  - Living Buyouts
  - Business Succession Planning
- **Annual "Accountant – Ready" Tax Packages**
  - Investment Products implemented through our Wealth Management Services accounts have 1109s which are prepared and compiled with a summary and details of any gains or losses taken during the year.
  - Help reduce you and your accountant's annual tax preparation workload.
- **Year End Capital Gains Tax Adjustments**
  - We help you minimize your annual capital gains taxes both within your portfolio and from other investments by helping you reposition investments to realize necessary losses at the end of each year to offset any realized gains.
  - We can coordinate this effort with you and your accountant so that all of your investments are working in tandem.
- **Referrals to our Network of Professionals**
  - Personal and Family Trust Advisors
  - Insurance Advisors
  - Alternative Investment Advisors
  - Employee Benefits Consultant
  - Credit and Lending Analysis
  - Estate Planning Attorney
  - CPA
  - Legal Counsel