

FAULKNER FINANCIAL, LLC

Serving Non-Profit Organizations, Clients and Community

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Charitable Giving

- Planned Giving Seminars
- Strategies to educate individuals how to give to your organization
- Charitable Remainder Trust
- Tax-advantage Distributions from IRAs for Charitable Purpose
- Life Insurance Strategies

Special Needs Planning

- Preparing Families for the Future
- Special Needs Trust Funding
- Retirement Strategies
- Disability Income Insurance

Our Services

Estate Planning

- Asset Protection Strategies
- Trusts Company Services**

Asset Management

- Estate Preservation
- Asset Protection Strategies
- Gift and Estate Tax Reduction Strategies

Employer/Employee Benefit

- Tax Sheltered Annuity (TSA) Products
- Group Disability and Life Insurance*
- Group Health Insurance*
- Personal Needs Analysis Review
- Executive Benefits
- Financial Workshops

*Not offered through MassMutual.

**"Trust services offered through The MassMutual Trust Company, FSB