John G. Ullman & Associates, Inc.

COMPREHENSIVE WEALTH MANAGEMENT SINCE 1978

Our Model Since the Beginning Was Simple "The Concept of Having an Extremely Close Relationship With Clients Handling Essentially All Broadly Defined Financial Matters In One Organization."

Through the different stages and transitions that life brings, John G. Ullman & Associates, Inc. provides services that can add value to those situations:

Life Stages	Life Transitions
Starting Out, The Career Years, The Growing Family, Elderly Parent Care, Retirement, Generational Wealth Protection and/or Planning, Legacy	College, First Job/Loss of Job, Purchase of Home or Relocation, Change in Marital Status, New Parents, Career Change, Illness/Disability

Services We Provide to Add Value Through Life Stages & Transitions

Goal Setting	Helping to Determine and Set Personal Risk Tolerance Profile	Cash Flow Analysis
Survivorship Cash Flow Analysis	Estate Planning	Wealth Accumulation Strategies
Tax Planning and Preparation	Employer Benefit Reviews	Risk Management
Education Planning	Charitable Gift Planning	Retirement

Interested in Learning More About Our Services?
Email: info@jgua.com or
Call Toll Free: 1 (800) 936-3785

We are not practicing attorneys or licensed insurance sales professionals. We review these areas as an objective third party with our clients' interests at the forefront. We are in a good position to help identify any issues that need to be addressed due to our in-depth knowledge of our clients current situation, goals and feelings.