

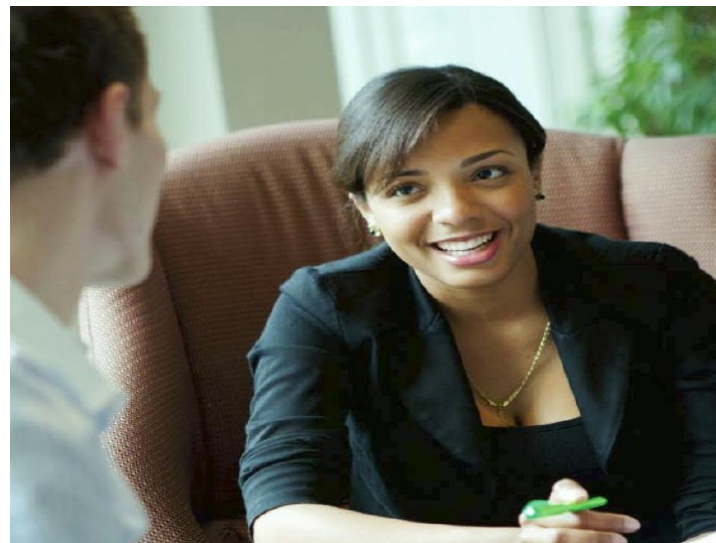
Establish Tax Planning Strategies

## planning, calculating & managing

Addressing your  
long-term financial goals


You have every right to expect attention, knowledge, insight and integrity from your financial consultant. With clear focus on you and your unique needs your National One advisor will be there to help with all your financial goals.

National One advisors are FINRA registered through Financial West Group, Member FINRA/SIPC.



## Products & Services

- Tax Preparation & Planning
- Estate Planning
- Mutual Funds
- Annuities
- Life Insurance
- Real Estate Investment Trusts
- Fixed Income (Bonds)
- Equities (Stocks)
- College Planning
- Small Business Bookkeeping & Payroll
- IRA & 401K Rollovers
- Monthly Income Planning



Taking control  
of your  
monetary assets

National One advisors are able to choose among thousands of products to meet your specific set of circumstances. This independence will help you take control of your investment choices.

## Tax Preparation

Three reasons why you should consult  
National One Advisors

### 1. Help Reduce Your Taxes

National One Advisors will not just prepare your tax return, we will manage your taxes. At National One Advisors you are working with a professional planner who has detailed knowledge about today's tax codes, IRS regulations and tax law changes that could impact you. By planning your taxes we will help manage your paycheck or retirement income withholdings as well as maximize your deductions and credits. We will help you save as much as is possible on the taxes you have to pay.

[Why pay more taxes than you have to?](#)

### 2. Solid Relationship

In order to do the best job possible for our clients we work to learn about your personal situation and needs, helping us understand your short, medium and long-term goals. Every individual and family goes through life cycle events such as starting a family, college & career planning, retirement and estate planning. Rely on our experience to develop enhanced strategies to support your family's needs now and in the future.

[Shouldn't you work with people you trust?](#)

### 3. Year Round Service

At National One Advisors you will find a familiar face, in an office open year-round, unlike many tax firms that close after April 15th. We do this because you never know when a decision you make will have an impact on your tax situation. Simple issues such as childcare, education costs and investments could have serious tax implications. National One Advisors is available throughout the year to serve you and your tax and investment needs.

[Don't you deserve an answer when you need one?](#)



## About Us....

National One Advisors is a full service tax and financial firm offering clients tax preparation, investment advice and estate planning services for individual and small business owners. Few tax preparation firms provide year-round access to a tax professional as we do.

National One advisors also have access to a full-range of investment options with securities offered through Financial West Group Members of FINRA/SIPC.

At National One Advisors we combine financial advice with tax planning strategies to help our clients achieve their short and medium range financial goals as well as their long-term retirement and estate objectives.

Contact National One Advisors to schedule your no obligation appointment to review your prior year tax return and answer any questions you might have about your personal financial situation. Be sure to ask about our introductory tax preparation fees for first year tax clients.

## Commitment to our clients

The founders of National One Advisors have been in the tax and financial planning business for over 20 years. We have a vested interest in providing quality service for each of our valued clients. Since much of our growth comes through referral, we strive to exceed our client's expectations in everything we do.

*We welcome the opportunity to serve you as a client...*

### National One Advisors

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***Securities offered through Financial West Group, a Registered Broker/Dealer;***

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## National One Advisors

Establish Tax Planning Strategies

It's time to take  
control of your  
finances . . .

