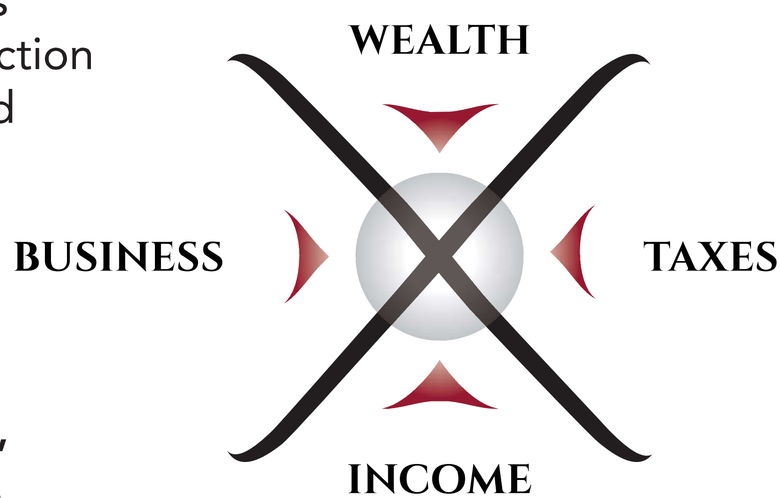
XCEPTION ADVISORY GROUP

For Clients who are the *XCEPTION* to the Rule...

Xception Advisory Group offers a team of experts with a cross section of skills to serve the sophisticated financial needs of successful entrepreneurs.

We specialize in custom strategic planning and problem solving where **BUSINESS, TAXES, WEALTH and INCOME** intersect.



SERVICES

- Business Succession Planning
- Executive Compensation & Management Retention
- Estate Planning Strategies
- Income & Estate Tax Consulting
- Business Consulting Services
- Life Insurance Design
- Investment Management & Advisory Services
- 401(k) Plan Financial Advisory Services
- Retirement Planning
- Employee Financial Wellness Seminars

CLIENTS

At Xception Advisory Group, we focus our efforts where we can make the greatest impact.

Clients benefiting most from our guidance include:

- Successful business owners with long-term planning goals;
- High net worth households ($10 million and above);
- High income households ($1 million and above);
- Entrepreneurs with complex business holdings.

STRATEGIC PARTNERS

In serving our clients we routinely introduce other experts with complimentary skill sets including:

- CPA firms;
- Employee Benefit Consultants;
- Property & Casualty Insurance advisors;
- Institutional Investment Assets Managers;
- 401(k) Plan Consultants;
- Law firms;
- Captive Insurance Company managers;
- Business Valuation Experts.