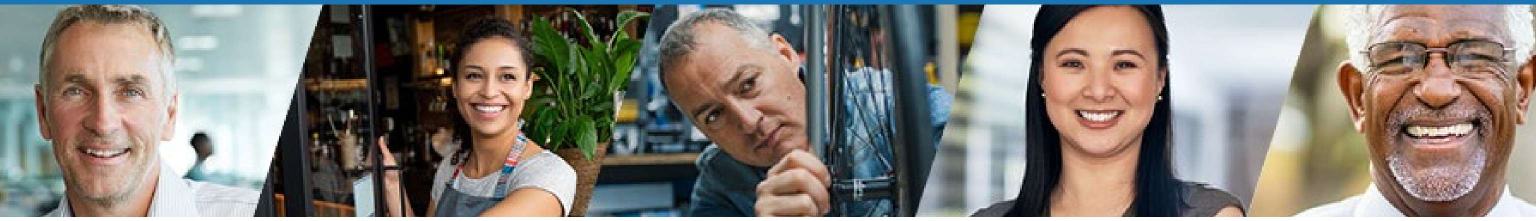
Omega Wealth Management, LLC

SERVICES



MULTI-GENERATIONAL WEALTH PLANNING SERVICES:

- Family legacy planning
- Multi-generational estate tax planning
- Family gifting strategies
- Philanthropic giving strategies
- Family business transition planning
- Wealth preparation/ education for the Rising Generation(s)

FINANCIAL PLANNING:

- Retirement analysis
- Social Security maximization
- Retirement distribution strategy
- College education funding analysis and strategy
- Insurance needs analysis and strategy (life, disability, long term care, property & casualty)
- Real estate purchase analysis and investment strategy
- Cash flow management strategy
- Tax planning and coordination strategy
- Estate planning strategy and coaching
- Charitable giving planning strategy
- Executive benefits planning (deferred comp, RSUs and other benefits)

LIFE PLANNING/TRANSITION MANAGEMENT:

- Sudden windfalls
- Post-divorce planning
- Business sale planning
- Major career/job change planning
- Are You Ready to Retire?

INVESTMENT MANAGEMENT:

- Fund of managers and mutual fund strategies
- Exchange traded fund (ETF) strategies
- Risk profiling and risk capacity assessment
- Stock option/RSU strategy
- "Pools of Wealth" strategy
- Cash management strategy
- Inherited stock/bond analysis and management
- Socially responsible investing (SRI)/ Environmental • Social Governance (ESG) investing strategies

BUSINESS RELATED SERVICES:

- Executive/management team Kolbe and Strengthsfinder profiling
- Entrepreneurial coaching
- Preparation for sale strategy
- Integration of business and personal goals
- Benefits review (general)
- Solo 40lk setup and management

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