



*When life takes you in a new direction,
we are here to help you thrive.*



Women's Wealth
Connection
of Warren Averett

WHO WE ARE

Warren Averett understands the challenges of making sound financial decisions while navigating life. Divorce, loss of a spouse, inheritance, business changes...any event that impacts your financial picture...these are the right times to contact our team of advisors.

Warren Averett is one of the largest CPA and Advisory firms in the Southeast. Our affiliate, Warren Averett Asset Management, advises on assets in excess of \$2 Billion. With a **passion** for what we do, a **collaborative** team approach and a **transparent** fee schedule, we are uniquely positioned to help you thrive wherever life takes you.

WHY WE SERVE

When your financial picture changes, you want to know your advisors have your best interests at heart. We're advisors who **educate**, help you **achieve** financial security and **simplify** financial complexities. We will work with your attorneys to navigate difficult legal necessities and help you avoid costly investment mistakes. We partner with you to reduce the stress associated with your financial future so that you can achieve your goals.

WHAT WE OFFER

You'll have access to **highly credentialed** advisors – Certified Public Accountants (CPA), Accredited Estate Planners (AEP), attorneys (J.D.), Chartered Financial Analysts (CFA) and Certified Financial Planners (CFP®). Whether you need the expertise of one or all of our team members, you can be confident that you will be empowered to focus on what matters most in your life.

*"I can do things you cannot; you can do things I cannot;
together we can do great things." —Mother Teresa*



Let us help you choose the services that are right for you.

Our services include:

- Comprehensive Financial Planning
- Asset Management
- Investment Education
- Income Tax Planning & Budgeting
- Estate Planning
- Cash Flow Planning
- Retirement Planning
- Trust Administration Assistance
- Business Valuation
- Debt Analysis
- Education Planning & Saving
- Insurance Analysis
- Medicare & Social Security Planning
- Coordinating Updates of Legal Documents
- Charitable Giving
- Mediation Support



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ALABAMA | FLORIDA | GEORGIA

Combined services offered by Warren Averett and Warren Averett Asset Management