DYNASTY ADVISORS LLC

At Dynasty Advisors our mission is to help you achieve financial independence. As professional independent financial advisors, we focus objectively on your financial goals and issues. Whether you have needs as an individual, business or institution, our unique processes, independence and experience allows us to act as true advisors and client advocates. We take great pride in developing long lasting relationships with our clients by providing professional, unbiased advice backed by excellent client service.

We look forward to showing how the Dynasty Difference can help you with the many financial services and products that our clients find beneficial.

Financial Services Wealth Management

Financial Planning*
- Financial Coaching
- Wealth Accumulation
- Retirement
- Business Exit and Succession
- Estate and Wealth Preservation
- College Funding
- Charitable Giving

Investment Management*
- Individuals
- Businesses
- Non-profits
- Retirement Plans - 401(k), 403(b), IRA, SEP, SIMPLE, Profit Sharing
- Pensions
- Endowments
- Trust Accounts

Annuities - Fixed and Variable

529 Plans

Insurance
- Insurance Analysis and Review
- Individual Life - Variable, Fixed, Term
- Coporate-Owned Life (COLI)
- Individual Long Term Disability
- Business Overhead Disability
- Long Term Care
- Buy-Sell Agreement Funding
- Property and Casualty
  Home, Auto and Business
- Personal Liability Umbrella
- Workmans Compensation
- Directors & Officers Liability

Health Insurance Employee Benefits

Health Insurance
- Small and Large Groups
- Individuals

Group Benefits
- Life Insurance
- Short & Long Term Disability
- Long Term Care

Health Savings Accounts (HSA)

Health Reimbursement Arrangements (HRA)

Flexible Spending Accounts (FSA)

Cafeteria Plans

Medicare Advantage, Supplement and Part D Prescription Plans

Work Site Supplemental Benefits

Prepaid Legal and Identity Theft Protection Plans

Aflac

Retirement Plans

Defined Contribution Plans
- 401(k) - Traditional and Roth
- 403(b) - Traditional and Roth
- Profit Sharing
- SEP IRA
- SIMPLE IRA
- Keogh
- Employee Stock Ownership Plans (ESOP)

Defined Benefit Plans
- Pensions
- Cash Balance Plans
- 412(i)

Plan Analysis, Design and Service

Investment Management

ERISA and DOL Compliance

Employee Education

Plan Sponsor Fiduciary Protection

Non-Profit Organization Services

Planned Giving Programs

Endowment & Investment Management

Cash Management

Legacy Planning

Donor & Supporter Appreciation Events

Board Education Programs

Executive & Key Person Benefits

Non-qualified Retirement Plans

Deferred Compensation

Performance Compensation Plans

Life Insurance Bonus

Key Person Life Insurance

Disability Carve-Out

Financial Planning*

** Financial Planning and Investment Management services through Securities America Advisors, Inc.*

The Dynasty Difference - Client-Focused, Objective and Independent Advice!

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