



Investment Planning

We believe that a well thought out strategic plan is an essential first step in reaching long-term financial goals. Whether you're accumulating assets to fund a long-term goal (e.g. retirement) or positioning existing assets for income distribution, we will offer objective advice and create customized solutions. You will receive local, personalized, cost-sensitive attention that will assist you in reaching your financial goals.

Some of our Investment Planning specialties

- **Investment Portfolio Development**
- **Retirement Income Planning**
- **Retirement Transition Planning**
- **College Funding**
- **Investment Advisory Services**
- **Investment Brokerage Services**
- **Estate Transition Asset Planning**

Suite 200
4733 Tacoma Mall Boulevard
Post Office Box 11207
Tacoma, WA 98411-0207

Phone: 253-272-2711 or
888-8ALBERS (825-2377)
Fax: 253-572-1499
askus@alberscompany.com
www.alberscompany.com

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