PROTECTING YOUR WEALTH. ESTABLISHING YOUR LEGACY.

As you look back over the course of your life, are you confident that the nest egg you've worked so hard to create will nourish your dreams for the future?

You've worked hard for what you have. Magnolia Financial Advisors wants to help you keep it.

What do we do?

Magnolia Financial Advisors is a diversified and fully independent investment and retirement planning advisory firm. Our strength is our dedication in assisting individuals structure a plan that will not only help them maintain their lifestyle during retirement; we also assist them in planning a legacy that will outlive them.

Magnolia Financial Advisors' Managing Partners have a combined experience of more than 70 years. As such, we are qualified to review; recommend, and monitor your investments, while remaining mindful of your personal objectives and goals. The plans we structure will be tailored to your individual needs and goals.

Retirement Planning

Successful implementation and periodic review of your retirement plan will ensure financial independence during your working years and throughout those golden ones. As a firm, that is one of our core competencies.

Financial Planning

A properly structured financial plan enables you to face any financial challenge that may present itself at each stage of your life. Through the financial planning process, we can help you assess your financial needs and develop strategies that will enable you to achieve your goals and strengthen your financial security.

Tax Planning

Tax planning is an essential element of the tax preparation process. By making tax planning part of your overall personal and business strategy, you can use our experience and access to the most current new developments in the tax laws to minimize both your current and future tax liabilities

Investment Review

As we help you develop your investment strategy, we will not only act as your sounding board, we'll work as your investment advisor and build an investment portfolio that takes into consideration the impact of taxes and produces a favorable after-tax return.

Estate Planning

Effective estate planning facilitates the orderly transfer of assets to your beneficiaries, provides security for your surviving spouse, and can reduce or eliminate the tax due on the transfer of your business and other assets. For business owners, providing for business continuity and succession of ownership is essential. We can guide you through the complex process.

Asset Protection

Asset protection or a wealth preservation plan makes the enforcement of judgments against protected assets nearly impossible and allows the owner of protected assets to retain substantial control over these assets. We can assist you with an asset protection plan that may include family limited partnerships or other trust structures.

MAGENTA BLACK
YELLOW CYAN

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