

EXECUTIVE SERVICES OVERVIEW

Your executives and key employees are your company's most valuable assets, and retention in these critical positions has a significant impact on your company's growth and performance. The packaging of valuable incentives and benefits can make the difference in your ability to hire and retain executive leadership. Gregory, Sharer & Stuart and HK Financial Services (HKFS) understand the importance of talent recruitment and retention, and our services allow you to offer valuable executive benefit packages.

INCOME TAX PREPARATION

Participating executives could have their federal, state and local income tax returns completed by knowledgeable CPAs at Gregory, Sharer & Stuart, with the added value of expertise on tax-savings opportunities both at tax time and throughout the year.

COMPLIMENTARY FINANCIAL PLANNING SESSION

HKFS offers comprehensive financial planning through our guidance, planning, strategy program. By participating, executives receive a confidential, one-on-one meeting that results in a clear articulation of their personal financial goals, a customized plan detailing objective guidance, and recommendations.

COMPLIMENTARY INVESTMENT, RISK MANAGEMENT AND RETIREMENT PLAN REVIEW

This program includes a review and analysis of the executive's investment portfolio, insurance and your business retirement plan options, all with the objective of staying on-track with their personal and retirement goals.

ENHANCED 401(K) SERVICE PACKAGE

This package is unique in the industry, and by working together, we can help your business develop a high-performing 401(k) plan that maximizes the investments of your business and your employee's contributions.

Executive services allows business owners to provide their executives an extremely valuable service to make sure their financial house is in order at no cost to you or the executive.

Securities offered through ProEquities, Inc., a Registered Broker Dealer and Member FINRA and SIPC. Advisory Services offered through HK Financial Services, Inc. (HKFS), a Registered Investment Advisor. HKFS is independent of ProEquities, Inc.

HKFS does not provide tax, legal or accounting advice. This material has been prepared for general informational purposes only. Please consult your own tax, legal and accounting advisors before engaging in any transaction. 6084288

Contact your financial advisor or CPA for more details.



HK FINANCIAL SERVICES
800.791.8994 | www.hkfs.com



Gregory, Sharer & Stuart
Certified Public Accountants and Business Consultants

Gregory, Sharer & Stuart
100 Second Avenue South, Suite 600
St. Petersburg, FL 33701
727.821.6161 | www.gsscpa.com



YOUR FINANCIAL NAVIGATION PARTNER