



It is possible to refine, polish, or redirect your thinking to make better, smarter decisions.

As an income tax and investment services firm, we strive to keep our clients well-informed with the latest news in the financial sector. The current market conditions emphasize the challenges many investors are facing and why it is important to continually review your investments so you can move forward in this tough economic environment.

*Securities Offered Through Cadaret, Grant and Co., Inc. Member FINRA/SIPC  
Cadaret, Grant and [company name] are separate entities*

## S.O.S

“Second Opinion Services”

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It is considered wise to ask a trained professional – with relevant expertise – for a second opinion before undergoing critical medical procedures. Why not apply the same principle to critical financial decisions, where the best possible outcome can mean reduced risk and substantially greater returns.

**Flexible solutions for  
your financial needs.**

**Complete and  
comprehensive  
analysis of your  
income tax and  
investment needs.**

**Our process is  
simple:**

It starts with a high level review of the opportunities, strategies, or initiatives you have on the table.

We talk together about possibilities and expectations.

Together, we explore low hanging fruit **or search for new orchards to harvest...**

FOR OVER 30 YEARS, WE'VE WORKED WITH  
A DIVERSE CUSTOMER BASE. HOW CAN WE  
HELP YOU?