

THE LIFE PLAN™

Legal - Insurance - Financial - Estate

**THE LAW OFFICES OF
LAURENT W. METZLER, J.D.**

ESTATE PLANNING

Wills, Trusts, POA's
Living Wills
Elder Care
Guardianships
Legacy Planning
Estate Administration
Estate Litigation
Fiduciary Tax Returns

REAL ESTATE TRANSACTIONS

BUSINESS SERVICES

Business Selection & Formation
Succession Planning
Owner Exit Strategies
Business Transfers
Mergers, Sales & Acquisitions

APOGEE
FINANCIAL SERVICES GROUP

WEALTH MANAGEMENT

Registered Investment Advisor
Charles Schwab Advisor
Retirement & Retirement Income Planning
Social Security Planning
Long Term Care Planning
Personal Financial Planning
Debt Elimination & Programmed Savings Solutions
Personal & Business Tax Planning
Personal & Business Tax Return Preparation

INNOVATIVE
RETIREMENT SOLUTIONS

CRASH PROOF RETIREMENT SOLUTIONS

Tax Favored Retirement Solutions
Retirement Plan Analysis and Optimization
Money Management Solutions
Risk Management Solutions
Life Insurance
Annuities
Long Term Care Insurance

INNOVATIVE
COLLEGE FUNDING SOLUTIONS

FINDING MONEY FOR COLLEGE & MAXIMIZING FINANCIAL AID

Asset Repositioning
FAFSA and CSS Profile Form Preparation
Financial Aid Appeals
Alternative Funding Solutions
Student Coaching and Positioning
School Selection
Scholarship Assistance
College Planning Network Members & Advisors