



The Occhipinti Group

SERVICES FOR PROFESSIONAL ADVISORS

We provide the following value-added services to compliment your business with the objective of helping you to better service the needs of your clients, close more business, improve client satisfaction, and improve the quality of life in our communities.

- **Client advisory** meetings with individuals and family clients to review and discuss how proposed charitable planned gifts can, as a part of their overall plans, help them accomplish their financial, tax, and estate legacy planning goals. An overwhelming majority of Americans are charitably-minded and would like to give more as long as their needs and that of their family are met. Charitable gift planning can empower them to make gifts hundreds of times greater than what they have made or can make during their lifetime without adversely affecting their lifestyle or heirs' inheritance. *We provide your clients expert charitable gift planning consultation and guidance with the objective of assisting them to make well-informed, heartfelt, taxwise and financial appropriate planned gifts in coordination with your professional recommendations and planning. Providing expert confirmation of your planning recommendations facilitates your closing of business and plan implementation.*
- **Professional education seminars** designed to assist professional advisors recognize the opportunities for planned gifts and practical charitable solutions to clients' financial, tax, and estate planning needs. *Being better educated about the charitable alternatives for clients planning needs gives you more tools for your toolbox and a competitive edge.*
- **Professional advisory services** for you to call upon to discuss charitable gift planning scenarios for specific client situations. *This complimentary service provides you access to professional charitable gift planning counsel.*
- **Planned giving program support** for your charitable organization clients for whom you provide legal, investment, trustee, insurance, and other professional services. *We provide consulting services to assist your non-profit clients take their charitable gift planning program to the next level and increase their results. As part of your team, this service provides another tool to serve your non-profit clients' needs and increase their satisfaction with your services.*

23052-H Alicia Parkway, #248
Mission Viejo, CA 92692
(949) 463.8060
Michael@TheOcchipintiGroup.com
www.TheOcchipintiGroup.com