



**Northeast Financial Strategies, Inc. (NFS)**, founded by Jim Schweitzer, President, is a financial services organization with highly trained professionals working together to provide products and services to business owners and individuals. NFS is dedicated to problem solving which is reflected in our diversified portfolio of resources.

### Personal Financial, Estate & Tax Services

A comprehensive financial evaluation helps you to achieve your financial goals.

- Hedge Against Inflation
- Minimize Income Taxes
- Education (529 Plan) and Retirement Planning
- Increase Net Worth
- Provide for Smooth Distribution of Your Estate
- Living Trust & Wills (Affiliation with Attorney)
- Individual Income Tax Preparation
- Mortgage Lending & Financing Programs  
(Affiliation with Mortgage Broker)
- Mortgage Protection Insurance

### Business Financial & Accounting / Tax Services

We take steps to identify your key financial concerns, evaluate current and future investments in relation to your concerns, identify weaknesses in specific investments and suggest tax-advantaged methods for achieving your goals.

- Current Financial Position
- Business Valuation
- Operational Reserves
- Key Employee Plans
- Business Continuation
- Business Insurance
- Business Start-ups
- Business Income Tax Preparation
- Full Accounting Services
- Bookkeeping & Write-ups
- Complete Payroll Services

### Financial Tools

At NFS, we use a full range of financial, estate tax & income tax methods to determine the goals and objectives of our clients and then provide assistance in choosing suitable solutions.

- Individual Retirement Accounts (IRA), Simple Plans, SEP Plans & Solo (K) Plans
- Pension Plan Design and Implementation
- Lump Sum Distributions
- Estate Preservation / Living Trust & Wills (Affiliation with Attorney)
- Corporate Benefit Planning
- Mutual Funds
- Stocks & Bonds
- Fixed & Variable Annuities
- Life, Health, Disability and Long-Term Care Insurance Services
- Mortgage & Financing Programs - (Affiliation with Mortgage Broker)



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**“Financial Strategies That Fit Your Needs”**