

Corporate Professionals and Senior Executives

Corporate executives often face the type of financial challenges that require the expertise of a range of specialists – like the undetermined value of your deferred compensation, the inherent risk of a concentrated position or the unique tax liabilities in your financial picture. Through a multi-faceted team, we work to integrate these priorities into one clear, personalized strategy for your retirement.

Investment Strategies Geared toward Executives:

At the core of your advisory team is Jeff Schall, an Investment Advisor with over 25 years' experience working with business leaders. Through a disciplined investment process, you can benefit from strategies such as diversification tactics to counterbalance your concentrated position in your company, while balancing growth and income to align with your retirement projections.

High Net Worth Financial Planning:

By working with a High Net Worth Financial Planner, we can incorporate unique structures and specialized planning strategies that can help simplify your financial life. This often involves understanding your corporate benefits, pension and deferred compensation in order to define an all-encompassing retirement plan.

Private Banking Opportunities:

Working with a Private Banker means you can tailor your banking and lending strategies while taking advantages of time-saving features and exclusive benefits. As a senior executive working with Schall Advisory Group, you gain access to high-end private banking services at exclusive rates.

Building Your Estate Plan:

We also integrate legacy planning into your custom strategy, through Estate Planning Advisors who put in place the steps needed to meet your long-term family and legacy goals. We also coordinate with your estate lawyer and accountant to ensure your estate documentation remains up to date.

Private Trust Advice:

Customizing specialized trusts becomes possible when you have access to Private Trust Officers. We work with senior executives to explore the use of various types of trusts for the purpose of transferring wealth, mitigating taxes, and empowering the rising generation.

Specialized Insurance Strategies:

Having access to an insurance advisors means that you can incorporate unique policy types as part of your ongoing risk management strategy. This often creates opportunities for senior executives to mitigate tax, improve retirement income and transition assets.