Securities offered through LPL Financial, Member FINRA/SIPC

A Future of Fulfillment

Since 1988, we have been helping our clients work toward financial security with our personalized approach to wealth planning, accumulation and preservation.

Securing your dreams takes effort and energy, leaving little time for wealth management. We can take that responsibility off your hands while helping you pursue your goals. With us as your wealth advisors, you will enjoy the confidence that comes from knowing that one of the leading wealth management companies in the country is handling your plan.

At Market Street Wealth Management Group, you will work hand-in-hand with your personal wealth advisor to develop your goals. David Wise and Kathy Kueider are experienced industry professionals who have provided financial services to clients for over 26 years. They are both members of the Million Dollar Round Table, hold Masters Degrees in Financial Services, and are LPL Financial Masters Conference qualifiers. They belong to the Society of Financial Service Professionals and the National Association of Insurance and Financial Advisors.

Since 1988, we have been helping our clients work toward financial security with our personalized approach to wealth planning, accumulation and preservation.

Rest assured that our goal is to help you maintain the standard of living to which you have become accustomed, and to preserve your wealth for your children and grandchildren. In developing and maintaining a well thought-out wealth accumulation plan, we focus on a variety of personalized strategies. We have access to a broad range of non-proprietary financial products from which to choose to help pursue your goals.

Pursue Pleasure

Our seamless proactive approach ensures that your investments will keep pace with the changes in your life.

Seamless Proactive Services (SPS®)

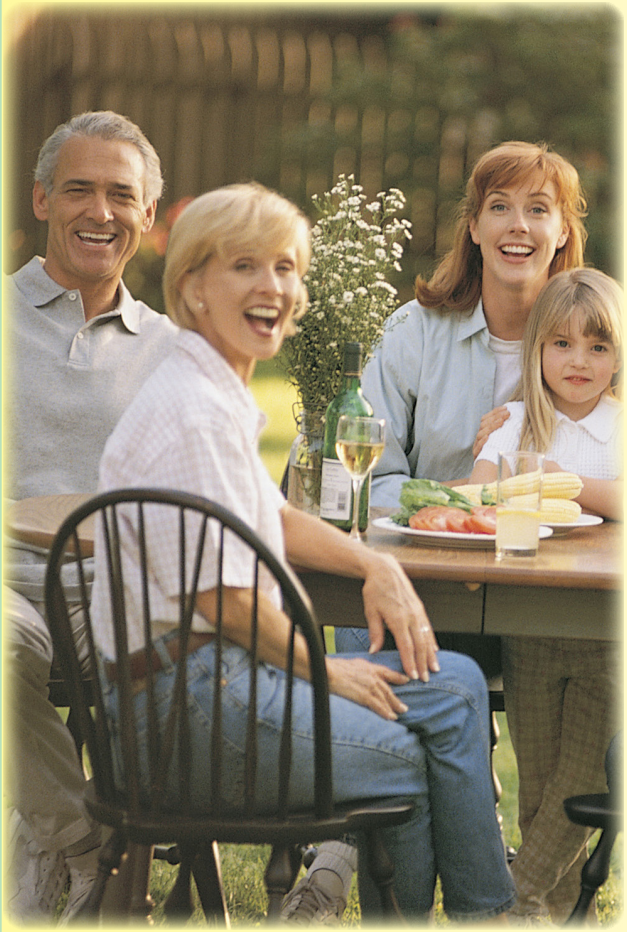
Wouldn't you rather be playing the back nine of Pebble Beach or flying to that special sun-soaked island than dealing with multiple financial service companies? Our seamless proactive approach to client service is all about saving you time and worry. This unique structure means we can meet all your financial investment needs, eliminating the complexities associated with working with more than one company.

Our seamless service approach is supported by a full team of professionals that will work hard to help you work toward your personal financial goals. As you can see, we offer a full range of services, but regardless of which service you choose, we will review your portfolio proactively, anticipating your needs before you do. This process helps to ensure that your investments keep pace with the changes in your life.

We Offer:

- Wealth Planning
- Tax Planning
- Estate Planning
- Risk Management Planning
- Small Business Planning

Release Financial Worry to Fully Embrace Life



We can help you maximize the amount of free time you so richly deserve.

There's no time like the present to prepare for those long-awaited days of pursuing your passions, whether it's learning to play golf or nurturing your grandchildren. We can help you maximize the amount of free time you so richly deserve. By working with us now, we can arrange all the details that will affect your financial future, sparing you and/or your loved ones from having to make difficult decisions later.

Wealth Planning

This is where our specialists in tax, asset allocation, investment research and estate distribution develop a comprehensive accumulation and preservation plan that best meets your needs and goals.

Trust Services

We provide access to comprehensive trust services customized to meet your individual needs through a trust company known as The Private Trust Company, N.A., an affiliate of LPL Financial Services. From Revocable Trusts, Charitable Remainder Trusts to Irrevocable Life Insurance Trusts, The Private Trust Company provides the following services:

- Administration
- Tax Impacts/Reporting
- Compliance Matters
- Fiduciary Accountability

Tax Planning

We provide proactive tax planning and will work with your existing tax advisors to develop and implement strategies to potentially reduce the amount of taxes that you are currently paying.

Your Greatest Gift to Your Children is Your Legacy

Establishing an estate plan can be one of the most effective ways of providing for your family and leaving a legacy for the future.

Estate Planning

Establishing an estate plan as part of your comprehensive wealth plan can be one of the most effective ways of lowering estate taxes, while providing for your family and leaving a legacy for the future. We offer the following estate planning services:

- Coordinate with your attorney to implement your estate plan from beginning to end
- Retitle assets to reduce or eliminate estate taxes
- Retitle assets to avoid probate
- Bi-annual estate planning reviews

Risk Management Planning

Our risk management team will evaluate your non-financial risks, such as umbrella coverage, long-term care coverage, life coverage and medical coverage to be sure the unexpected does not put a halt on your future retirement.

Small Business Planning

Our business planning professionals will consult with you to evaluate or establish employee retirement plans, executive compensation and business buy-sell/continuity strategies. We will meet with you and/or the key team members of your organization, on a complimentary basis, to explore how we can best meet your needs.

Financial Management Involves More than Money

You will enjoy and appreciate the numerous benefits of being part of the Market Street Wealth Management Group family.

Our mission is to guide you to make the right decisions for your financial future. You will enjoy and appreciate the numerous benefits of being part of the Market Street Wealth Management Group family. This alliance entitles you access to industry professionals, educational workshops and a variety of social events for the whole family.

- Financial management workshops
- Top industry experts as guest speaker
- Annual Holiday Celebration at the Barn Dinner Theatre

Come work with the Market Street Wealth Management Group – where we strive to enhance our clients' quality of life through our values-based planning services. Freeing your mind to enjoy the things that are important to you.

It's Our Job...
To Help Work Toward Making Your Dreams Come True

For a free consultation, contact
Market Street Wealth Management Group, LLC
today at (336) 294-1811 or toll-free at
(800) 999-1815 or visit our website at
www.mswmg.com

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