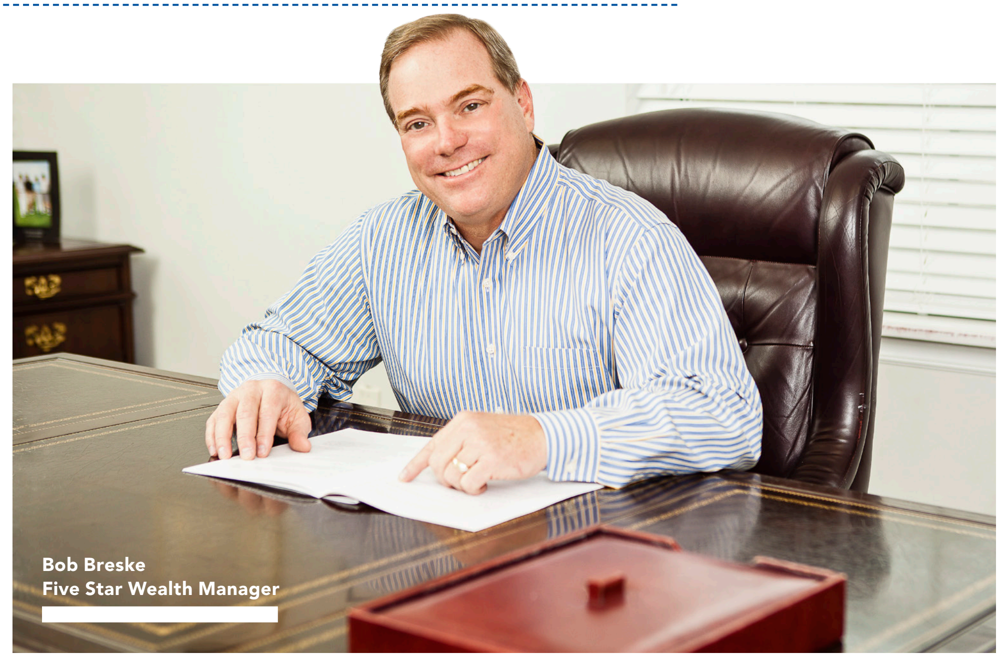
Personal Relationships Foster Personalized Financial Plans

As a family-operated business owner himself, Bob Breske understands the myriad of factors that impact a business owner's financial world: "Business owners are individuals—individuals who have goals for themselves, their business and their family."



Bob Breske
Five Star Wealth Manager

Photo by macbethphoto.com

Properly managed money, Breske says, is a wonderfully effective tool for accomplishing those goals.

As co-founder and managing partner of Breske & Breske, Inc., a boutique financial services firm, he has been helping clients accomplish their goals for more than three decades.

"We have a three-part process: consultation, coordination and implementation," Breske explains. "Building a personal relationship from the very beginning is essential. Our initial no-charge consultation helps determine whether we are a good advisor/client fit."

Serving the Business Owner

A major priority in advising business owners, Breske says, is guiding them as they access business capital for their personal life's needs.

His team works with clients to develop executive compensation packages and pension plans as well as long-term care plans, which Breske observes is "one of the biggest holes in most retirement plans."

Other key factors for business owners are creating an exit strategy and managing family dynamics: "We talk about when and how the owner might get out of the business and whether family should take over. We understand that family scenarios can be challenging, so we take individual dynamics into consideration."

Not all Breske & Breske clients are business owners, but they do have one commonality: "They have needs outside themselves. They want to care for their families and create a legacy."

The firm also has a personal understanding of families with special needs and works closely with these families to accommodate their unique needs and goals.

Strategies for Success

Clients come to Breske & Breske with varying degrees of desired involvement in managing their financial future. Some take advantage of their firm's comprehensive financial planning services while others prefer to maintain a level of control over their asset management.

But all clients appreciate guidance in understanding the risks and realistic parameters of today's market. The firm employs forward-thinking strategies, such as ETFs, to help clients obtain the best value for their investments.

"Sometimes the best investment is into the client's own business," Breske says. "You can't take your money with you when you go, but we can help you make your legacy last."

Breske & Breske, Inc. is located at 4447 Edgewater Drive in Orlando, FL. Call **407-521-4570** or visit **BreskeandBreske.com** for more information.