

Welcome to Birdseye Financial

We help individuals, families, and businesses plan for a secure future through education and cutting edge financial strategies. We believe that no two individuals or businesses are alike and this is why we are dedicated to giving our clients the personal attention they deserve. Our financial solutions are as unique as our clients.

Birdseye Financial offers a full range of financial products and services. We believe that tax planning strategies, retirement income planning, and estate conservation should be top priorities for individuals and families of all ages and income levels. Because many people regard financial strategies as complex and confusing, they often miss out on financial strategies that exist for them. They tend to take unnecessary risks & fail to adequately protect their assets.

Birdseye Financial specializes in estate planning for all sizes of estates, large and small. We help clients look at different methods to help reduce or eliminate unnecessary taxes such as income taxes, social security taxes, and estate taxes. In addition, we help clients avoid probate, increase spendable income, and protect against Medicaid spend-down of assets when Long-Term Care is needed.



BIRDSEYE FINANCIAL SPECIALIZES IN...

INSURANCES

- Medicare
- Final Expense
- Long-Term Care
- Health
- Life Insurance
- Dental

INVESTMENTS

- Annuities
- CD Alternatives
- IRA's
- Safe Investments
- Risk Investments through Secure Investment Management

PLANNING SERVICES

- **INCOME PLANNING**
- Retirement Planning
- Risk and Fee Analysis
- Pension Planning
- Social Security Options
- Tax Strategies
- Asset Protection
- Estate Planning

