

COVER



LEFT GATEFOLD

*Wherever
your financial
future takes
you....*

The image features three light gray, curved lines that originate from the bottom left and curve upwards and to the right, converging towards a small, dark gray oval shape on the right side. These lines are set against a white background within a larger white rectangular area.

RIGHT GATEFOLD

...we've got you covered.



Accounting & Assurance Services

Tax Planning & Advisory

Forecast and Projections

Accounting System Design & Implementation

Merger & Acquisition Support

Business Plan Development and Monitoring

Retirement Plan & 401k Audits

Forensic Accounting Services

State Rehab Cost Certification Services

Tax Return Preparation

IRS Representation

Estate & Gift Tax Planning

Business Formation, Succession Planning; Buy-Sell Agreements

State Tax Credits

Financial Planning

Wealth Management/Investment Advisory Services*

Wealth Preservation Strategies

Long Term Care Planning & Insurance

Insurance Planning/Policy Review

Disability, Income & Asset Protection

Education Planning & Funding

Retirement Planning

Charitable Gifting

Estate & Gift Planning

*Securities offered through 1st Global Capital Corp., Member FINRA, SIPC.

Investment advisory services offered through Bentley Wealth Advisors, LLC.

Bentley Wealth Advisors is not affiliated with 1st Global Capital Corp.

The Bentley Foundation manages the charitable giving for our friends, clients and employees by providing hospitality, volunteer efforts, and financial support.

Business Valuation & Litigation Support

Cost Segregation Studies

Research Tax Credit Studies

Historical Financial Performance Analysis

IT Support

IT Consulting & System Integration

Network Security & Data Protection

Information Technology Studies & Implementation

Internet, Telephone & Service Consultation

Marketing Advisory Services

Human Resources Consulting

Candidate Selection Process

Policies & Procedures Handbook Design

Advisory Services for Professional Firms

Strategic Planning Retreats

Pension Administration

Plan Selection & Design

Plan Document Preparation

New Participant Orientation

Form 5500 Preparation

Summary Annual Reports

Participant Statements

Plan Compliance Testing

Plan Document Preparation

Record Keeping Services