



# Guardian's Business Resource Center

**Delivering powerful financial solutions to guide you forward**



# Financial matters for business owners and high net worth individuals can be complex.

From structuring a succession plan for a business to developing an estate tax planning strategy, to increasing wealth for retirement and protecting it for the next generation — there is a lot to consider.

At Guardian, we believe that a successful plan lies in a holistic, team-based approach, providing a single point of contact to help simplify nearly every aspect of the planning process — from business to personal — no matter how challenging.



# Powerful, team-based solutions to guide you forward

A comprehensive plan is a useful tool for creating a snapshot of where you stand in achieving your financial goals. However, its real value lies in the conscientious considerations, recommendations, and support to help ensure a successful execution and continued development as life changes.

When you work with Guardian, you'll benefit from the collective experience of a dedicated team of professionals who can best match your financial goals and objectives with the most effective solutions possible.



# A Guardian financial professional

## Delivering powerful individualized support

Guardian's network of financial professionals offers years of experience working with high net worth individuals to help them navigate the complexities of the business and wealth transfer markets. By taking the time to understand and consider your complete financial picture, our financial professionals can help you craft a financial strategy that best reflects your individual objectives.

While Guardian's agencies and financial professionals provide individualized support for you in your community, there is a second part of the team that provides support at a higher level and empowers them to strategically address your financial goals.



**Guardian financial professionals can help you build a comprehensive strategy that provides objective and flexible wealth solutions with:**

- A balanced approach that considers both growth opportunities as well as your risk tolerance
- Objective solutions that give you a broader spectrum of possibilities
- A relationship that's built on mutual trust, strength, and stability





## The Business Resource Center (BRC)

In many instances, it may be appropriate to collaborate with other professionals, such as attorneys and Certified Public Accountants (CPAs). With a Guardian financial professional as the conduit, you'll also benefit from the broader network and intellectual capital of Guardian's Business Resource Center — a team of professionals backed by over 255 cumulative years of advanced business, individual, and wealth transfer planning experience that includes:

- Business, tax, and estate planning attorneys
- CPAs
- Certified Life Insurance Underwriters
- Chartered Financial Consultants

The team of professionals at the BRC provides a wealth of resources and insight into a wide range of planning strategies in multiple areas, including:

- Business succession
- Executive benefits
- Asset protection and risk management

- Complex life and disability insurance planning
- Estate planning
- Intergenerational wealth transfer
- Charitable giving and philanthropy
- Income and estate tax
- Planning for special needs family members

As a complimentary benefit, our financial professionals can also tap into Guardian's Business Resource Center to access a wide range of planning services that includes:

- Business Valuation
- Buy-Sell Plan reviews
- Will and Trust reviews
- Advanced concept reviews
- Case design and presentations
- Charitable planning support

# The three cornerstones on which Guardian's BRC is built



## **Experience**

The BRC offers you a collaborative, specialized team of knowledgeable professionals with vast experience in advanced planning markets.



## **Strategy**

With your goals at the forefront, we'll craft strategic plan designs and solutions to help you meet the challenges you face.



## **Innovation**

Our team approach brings together a collective pool of experience and knowledge to explore innovative solutions and new market opportunities — ready to adapt and evolve to meet the needs of a fast-changing world.







## Why Guardian?

Our BRC team boasts some of the most prominent analytical minds in the financial industry. Together, the BRC and Guardian's financial professionals are ready to work with you and your other counselors to create strategic plan design solutions custom-tailored to meet your specific goals and objectives.

**Talk to a Guardian financial professional today about how they can help you achieve financial balance.**

## Who we are

Guardian makes a difference in the lives of people when they need us most. With over 160 years of stability and fiscal integrity, we are a trusted resource to generations of families and business owners, inspiring well-being and helping build financial confidence.

Today, we stand behind millions of consumers, helping them prepare and plan for a bright future for themselves and their families. We help business owners care for their employees. And we help people recover and thrive in times of unexpected loss.

As a modern mutual insurance company, we believe in driving value beyond dividends. We invest in our colleagues, are building an inclusive and innovative culture, and are helping to uplift communities through thoughtful corporate impact programs.

Learn more about Guardian at [guardianlife.com](https://guardianlife.com).

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