

The Lyon Group Fiscal Second Opinion Service

Call to schedule a conversation 513-753-9966



INVESTMENTS

Have I done what I can to manage economic volatility?

INSURANCE

Am I Over-insured? Under-insured?
Do my coverages have the features and benefits to ensure my family is secure now and in the future?



RETIREMENT

How will my plan hold up to a "stress test" of possible events (bear markets, high inflation, premature death or disability, a longer than expected life)?

TAXES

Am I diversified appropriately from risk and a tax perspective?



ESTATE PLANNING

Does my estate plan pass along family values as well as family wealth?

www.thelyongroup.net

Bill Lyon and Bob Nienaber are Financial Advisers with Eagle Strategies LLC, a Registered Investment Adviser, Registered Representatives offering securities through NYLIFE Securities LLC, Member FINRA/SIPC) A Licensed Insurance Agency 5905 E. Galbraith Road, Suite 4000, Cincinnati, OH 45236 . The Lyon Group as well as NYLIFE Securities LLC and its affiliates do not provide tax, legal or accounting advice.

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