

# strategic planning for business



[www.middlefieldbank.com](http://www.middlefieldbank.com)

888-801-1666

Strategic planning is a key part of any business. Tax Planning, Succession Planning and Investment Management are integral to success. **The Middlefield Banking Company** employs the insights of Tom Hart, Financial Consultant with **LPL Financial**. Tom assists in clarifying options to help guide your focus to the strategy that creates your best advantage.

## retirement:

- Succession Planning
- Individual Retirement Accounts
- Simplified Employee Retirement Pension Plans
- Profit Sharing
- 401K Programs

## insurance programs:

- Implemented For Protection As Well As Strategic Planning
- Term, Permanent, Long Term Care Insurance

## brokerage services:

- Common And Preferred Stocks
- Corporate And Municipal Bonds
- Treasuries (Bills, Notes, And Bonds)
- Financial Analysis
- Mutual And Money Market Funds
- Retirement Planning
- Variable And Fixed Annuities
- Asset Allocation



Tom Hart

All with 24/7 access online



Located at

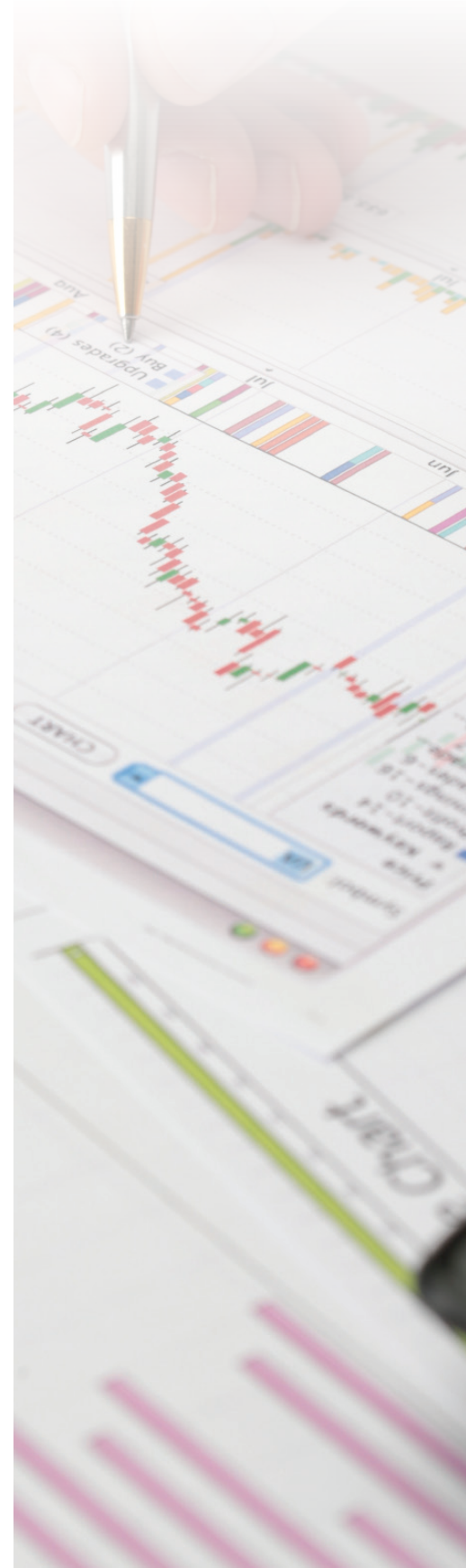


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# individual planning

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*Whether a business owner or an individual, we all have a future to think about. What will yours look like? Are you prepared?*

Sometimes it takes the vision of an objective observer to shed light on subjects that we personally find painful. It is not easy to think of our lives as ever-changing, but that is the reality. Tom Hart, Financial Consultant with **LPL Financial** has the objectivity to put planning into perspective. His experience with Insurance, Investment, Estate Planning and Tax planning can bring that clarity to your personal picture.

## retirement:

- Individual Retirement Accounts
- Simplified Employee Retirement Pension Plans
- Profit Sharing
- 401K Programs

## insurance:

- Insurance As Investment
- Insurance To Create Protections For Families And Survivors

## brokerage services:

- Common And Preferred Stocks
- Corporate And Municipal Bonds
- Treasuries (Bills, Notes, And Bonds)
- Financial Analysis
- Mutual And Money Market Funds
- Retirement Planning
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