




BLOSSOM FAMILY OFFICE

 FAMILY VALUES	 INCOME DETAILS	 INVESTMENT PORTFOLIO	 BUSINESS OWNER	 ASSET PROTECTION	 WEALTH TRANSFER	 SPECIAL PROJECTS
Legacy	Forecast Inflows and Outflows	Asset Management	Growth Capital and Financing	Wealth Protection	Facilitate the design of an Estate Plan	Concierge Services
Mission Statement	Strategies for Guaranteed Income	Accredited Investor	Strategic Advisory	Hedging, Monetization or Dispositions of Concentrated Positions	Coordinate Wealth Migration	Luxury Travel and Entertainment
Constitution	Tax Optimization	Design & Maintain Portfolio	Buy side/Sell side		Manage Charitable Giving	Total Wealth Reporting
Family Dynamics Planning	Liquidity Needs:	Draft Portfolio Guidelines	Retirement Plans:	Strategies for extracting liquidity from business	Multi-generational Planning:	Trustee Advisory
Summits, Mentoring and Education	<i>Buy, Build, Renovate or Refinance Home</i>	Risk Assessment	<i>Defined Contribution Plans</i>	Interest rate and currency hedging	<i>Grantor Retained Trust</i>	Agricultural, Art, Aircraft, Nautical and Automotive Advisory
Wellness	<i>Large Ticket Purchases</i>	Strategic Asset Allocation	<i>Defined Benefit Plans</i>		<i>Annual Gifts</i>	Multi-family Office
Impact Investments	<i>Education</i>	Tactical Asset Allocation	<i>Executive Compensation</i>	Evaluate and recommend the following:	<i>Charitable Remainder Trust</i>	Single-family Office
	<i>Tax Obligations</i>	Endowment Style Investing	<i>Deferred Compensation</i>	<i>Property/Casualty</i>	<i>Family Charitable Foundation</i>	Tax and Compliance Advisory
		Evaluate, Recommend and Manage Specific Investments:	<i>IRAs</i>	<i>Excess Liability</i>	<i>Charitable Lead Trust</i>	Cross-border Planning
		<i>Cash Management</i>	<i>Self-directed Retirement Plans</i>	<i>Disability / Health</i>	<i>Irrevocable Insurance Trust</i>	Special Purpose Vehicle
		<i>Corporate and Municipal Bonds</i>	<i>Solo 401K and Individual 401K Plans</i>	<i>Key Person Insurance</i>	<i>Personal Residence Trust</i>	Philanthropy:
		<i>Public Equity</i>	Succession:	Premature Death		<i>Donor Advised Funds</i>
		<i>Private Equity</i>	<i>Leadership Development</i>			<i>Charitable Vehicles</i>
		<i>Real Estate</i>	<i>Family Limited Partnership</i>			<i>Charitable Commitments</i>
		<i>Absolute Return</i>	<i>Installment Sale to Family</i>			
		<i>Natural Resources</i>	<i>Buy-Sell Agreement</i>			Micro-financing

Blossom Wealth Management
PO Box 125, Alamo, CA 94507
www.blossomwm.com

George Salter II, JD, MBA, CFP®
P: 925 946 9999 / F: 877 665 8765
E: george@blossomwm.com

James E. Salter, MBA, AIF®
P: 925.833.9999 / Fax: 877.665.8765
E: james@blossomwm.com

Craig Braemer, MS, CFA®, CFP®
P: 925 899 1093 / F: 877 665 8765
E: craig@blossomwm.com

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