RHS FINANCIAL

COMPREHENSIVE WEALTH MANAGEMENT, BOUTIQUE PERSONALIZED EXPERIENCE, BACKED BY INSTITUTIONAL INVESTMENT MANAGEMENT CAPABILITIES

FINANCIAL PLANNING

- Retirement
- F.I.R.E.
- Tax Planning
- College Planning
- Budgeting
- Estate Planning and Trusts
- Insurance Planning
- Cash Flow Analysis and Scenario testing
- Charitable Guidance and Donor Advised Funds

INVESTING

- Customizable Portfolios
- Portfolio Risk/Reward Optimization
- Personalized Tax Efficient Approach
- Concentrated and Appreciated Investments Tax and Risk Management
- Socially Responsible Strategies
- Liquid and Private Alternatives

FLEX FAMILY OFFICE

- Concierge services
- Vetted Professional Network
- Financial project management

REAL ESTATE

- First Home Guidance
- Second Home Guidance
- Vacation Property Advice
- Investment Property Analysis
- Private Deal Analysis
- Mortgage Solutions
- Bridge Loans

MISC.

- Banking Services
- Pledged Asset Line
- International Planning
- Career Transition

EQUITY COMP

- RSU
- ESPP
- ISO and AMT Guidance
- NQSO
- Pre and Post-IPO Guidance
- Early Exercise Guidance

Smart Wealth Management For Tech Professionals
Maximize Equity | Minimize Taxes | Optimize Wealth