





## PMFA AT A GLANCE

### Our First Priority: You

It's all about you, as it should be. Yet, in saying "you" we encompass every aspect of you, such as your family, business, and personal interests into your investment strategy – today and into the future. You are our first priority and that is why our approach to your wealth management is as unique as you. The consultants with Plante Moran Financial Advisors (PMFA) embrace the spirit of client service and offer premier wealth management expertise. Utilizing top resources and one of the most experienced financial advisory teams in the business, we'll help you devise a comprehensive, customized wealth management plan which will encompass your risk tolerance, expected returns, time horizon, and individual preferences for your long-term financial well being.

To assure you that we have only your interests in mind, PMFA is independent and objective. We are only compensated by the fees paid by you. Therefore, you can be assured that we are serving only you and placing your interests first.

## NEWS & EVENTS

-  [Is now the best time for an investment in real estate?](#)
-  [5 Consumer Tips for Beating the Rising Cost of "Everything"](#)
-  [Plante Moran Financial Advisors Among Bloomberg's List of Multifamily Offices](#)
-  [Plante Moran Financial Advisors Ranks Among Top Financial Advisors In The Country](#)

## RESOURCES

-  [Check up on the latest Market Performance statistics](#)
-  [Check out the latest monthly Market Commentary](#)
-  [Investment Portfolio Design: Determining Your Risk Tolerance](#)
-  [2005 Annual Letter - The Road Ahead: Retrospective on 2004: Risk and Reward.pdf](#)
-  [2005 Annual Report.pdf](#)
-  [Is a Family Office Right for You?](#)
-  [It's Your Choice - Protect It](#)
-  [How does your charitable giving compare to others?](#)

## INVESTMENT CONSULTING

[Overview](#)  
[Family Wealth Management](#)  
[Fiduciary Considerations](#)  
[Investment Planning Process](#)  
[Strategic Alliances](#)

## FINANCIAL PLANNING

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## ESTATE PLANNING

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## BUSINESS TRANSITION PLANNING

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## PENSION & PROFIT SHARING PLANS

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[Questions You May Be Considering](#)

## PLANTE MORAN TRUST

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## PLANTE MORAN INSURANCE AGENCY

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## TAX PLANNING

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## EDUCATION PLANNING

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## OVERVIEW

FAMILY WEALTH  
MANAGEMENTFIDUCIARY  
CONSIDERATIONSINVESTMENT PLANNING  
PROCESS

## STRATEGIC ALLIANCES

**PUTTING THE PIECES TOGETHER**

Your financial plan is just like a puzzle. You need to put the pieces together to create the bigger picture. Our advisors can design a successful plan that will help reach your financial goals. We offer a multi-disciplined approach — utilizing resources from other practice areas, such as tax, insurance, and estate planning — that will help to enhance your financial strength.

To assure you that we have only your interests in mind, PMFA is independent and objective. Our only interest is to serve your best interest. And that's to assist in helping you prosper and thrive.

Our Family Wealth Management services provide:

- Developing an investment strategy
- Planning your estate
- Formulating a succession plan for your family business
- Choosing a trustee

Members of your Advisory Team:

- Certified Public Accountants
- Certified Financial Planners
- Chartered Life Underwriters
- Chartered Financial Consultants
- Certified Investment Management Analysts
- Chartered Financial Analysts



## LITIGATION/VALUATION SERVICES AT A GLANCE

### Understanding the nature of your business.

You know your business like the back of your hand. All the ins and outs, ups and downs. You know it backwards and forwards...

...and so do we. We have the kind of in-depth knowledge and experience that will come in handy when you need top-flight litigation, valuation, or investigative services for your company.

Plante & Moran's Litigation, Valuation, & Investigative Services Group (LVISG) provides your organization with a diverse range of technical and industry expertise, many times drawing upon the firm's other disciplines. Our LVISG team applies proven accounting and business methodologies to various matters from investigative to analytical skills and technical to communication skills. We also have the capabilities to provide you with precise documentation and effective expert testimony.

## ARTICLES

-  [The Tone at the Top: What Message is Your Organization Sending?](#)
-  [Fraud Hotlines - Effective Fraud Deterrents](#)
-  [Fraud Works in Mysterious Ways - What to Look For, and What to Do If You Find It](#)

## SERVICES

### INVESTIGATIVE SERVICES

- [Overview](#)
- [Fraud](#)
- [Managerial Fraud](#)

### LITIGATION

- [Overview](#)
- [Antitrust](#)
- [Breach of Contract](#)
- [Business Interruptions](#)
- [Construction Delay & Disruption](#)
- [Employment Issues](#)
- [Intellectual Property Infringement](#)
- [Merger & Acquisition Disputes](#)
- [Professional Malpractice](#)
- [Other Services](#)

### VALUATION SERVICES

- [Overview](#)
- [Bankruptcy / Restructuring](#)
- [Buy / Sell Agreements](#)
- [ESOPs, Stock Plans & Stock Options](#)
- [Estate Planning](#)
- [Intangible Assets / Intellectual Property](#)
- [Other Services](#)

## LITIGATION, VALUATION & INVESTIGATIVE SERVICES

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# LITIGATION

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### OVERVIEW

### ANTITRUST

### BREACH OF CONTRACT

### BUSINESS INTERRUPTIONS

### CONSTRUCTION DELAY & DISRUPTION

### EMPLOYMENT ISSUES

### INTELLECTUAL PROPERTY INFRINGEMENT

### MERGER & ACQUISITION DISPUTES

### PROFESSIONAL MALPRACTICE

### OTHER SERVICES

## FIXING WHAT'S BROKEN

There's an old adage that says contracts were made to be broken. When they are, we provide you with assistance in any breach of contract matter. We'll evaluate causation and damage issues related to most any industry.

We'll perform analyses relating to:

- Lost revenue and market share
- Increased costs
- Capacity and the ability to achieve claimed lost sales
- Business operations and financial conditions
- Incremental cost behavior
- Cost allocation methodologies
- Cost of invested capital

## AUTO SUPPLIERS

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# QUALITY MANAGEMENT

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## QUALITY MANAGEMENT

### HELPING YOU REDUCE COSTS

QS-9000. ISO-9002. Six Sigma. Regardless of what quality management program your company has integrated into its organization, it's important that the program be implemented properly so it can positively impact your bottom line.

Plante & Moran's team of seasoned quality management professionals will not only help you reduce costs and improve productivity, but also increase the level of client satisfaction. From reducing scrap and rework costs, to the more effective management of a product or new service development through manufacturing and non-manufacturing business processes, our services can impact your bottom line.