

The CPS Core Value Proposition

What We Offer:

- A profound new experience of freedom, independence and confidence around your money and your financial well-being.
- A clear and accurate view of your financial future and continued prosperity.
- A fundamental enrichment to the quality of your life.

What We Strive to Do:

- Preserve and accelerate your wealth.
- Generate significant additional net wealth.
- Protect your assets from the many wealth-eroding factors (i.e., death, disability, inflation, taxes, lawsuits, negative investment returns, etc.).
- Create conservative economically-efficient financial strategies.

What You Can Expect:

- Well thought-out, time tested and sound financial alternatives.
- Side by side comparisons (Your present plan versus 3D Wealth strategies).
- Verifiable net results.

Why Clients Work With CPS:

- Unique proprietary 3D Wealth™ process.
- No additional out-of-pocket outlays.
- Great communication.
- Efficiency expertise.
- Seamless collaboration with current advisors.
- 40 years of real-world experience.
- Quality, long-term relationships.
- Commitment to extraordinary customer service.
- We get things accomplished.