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**FOLK WILLIAMS FINANCIAL**  
**MANAGEMENT, INC.**

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# Meet Folk Williams

Folk Williams Financial Management, Inc. is a tax and accounting firm with more than 60 years of experience providing comprehensive financial management services. Formerly known as Williams Tax & Financial Group, Folk Williams specializes in high-net worth families working in the areas of professional sports, entertainment, real estate, medicine, along with other types of business owners.

Folk Williams offers a wide range of services to optimize our clients' business and personal affairs, including bill payments, budgeting, income collection, tax strategy, investment management, risk management, and estate planning. We arrange financing for large purchases, such as automobiles, real estate, and business acquisitions, which helps our clients build strong credit profiles and banking relationships—the essential elements of an effective cash preservation strategy. Our digital bookkeeping system tracks all income and expenses, maintaining accurate and well-organized records for efficient tax planning.

## Wealth That Endures

Folk Williams takes a comprehensive and multi-faceted approach to financial management. We provide our clients the knowledge and tools they need to build, manage, and protect their wealth for a lifetime.

- ✓ **New Wealth:** The path to wealth begins with income but making it last requires a solid cash preservation strategy. Our clients learn how credit management, budgeting, investment strategies, and banking work together to expand their financial capabilities and extend their wealth's longevity.
- ✓ **Client as CEO:** Folk Williams treats each client as CEO, ensuring they maintain ownership of their affairs while receiving our expert guidance to make informed decisions. Much like a CFO, we advise on the impacts of decisions, helping our clients stay on course, plan for taxes, and preserve cash.
- ✓ **Family Fishing:** An essential aspect of every Folk Williams wealth management strategy is to help friends and family develop self-sufficient, sustainable lifestyles to foster independence and avoid dependency. It's an approach designed to preserve wealth—and important relationships.
- ✓ **Cash Preservation:** Our clients share a desire to sustain their lifestyles for the long term. Folk Williams takes a strategic approach to cash preservation, minimizing our clients' cash burn rate during peak earning years and building assets that support them and future generations of their family.
- ✓ **Balanced Scorecard:** For a long-term financial strategy to be effective, it needs to reflect the client's vision, purpose, and values. The Folk Williams Balanced Scorecard makes it easy to measure real-world results in relation to personalized goals, to stay on course and track success.
- ✓ **Checks and Balances:** Finding the right experts and specialists is an important part of a wealth management strategy, but while trust is important, it should never be blind. Folk Williams takes care to separate key financial functions, creating checks and balances that maximize accountability.

## Financial Services

### Personal CFO

Bookkeeping  
Budgeting  
Bill Payments  
Cash Management

### Tax Advisory

Tax Planning & Preparation  
• Personal Taxes  
• Corporate Taxes  
• Non-Profit Taxes  
Domestic  
International  
Charitable Planning

## Investment Planning

Stocks  
Bonds  
Mutual Funds  
Alternative Investments  
Real Estate  
Retirement Planning

### Business Advisory

Business Planning  
Business Valuation  
Business Formation

### Banking Relationships

Financing  
Real Estate  
Automobiles  
Credit Cards  
Business Startups  
Lines of Credit

## Risk Management

Life Insurance  
Disability Insurance  
Health Insurance  
Home Owners Insurance  
Auto Insurance  
Business Insurance

### Estate Planning

Trust  
Wills  
Power of Attorneys  
Medical Directives  
Beneficiary Designation

## Our Values. Our Q.U.E.S.T.

- 🏆 **Quality** There's no room for error in financial management. Our systems and processes deliver at the highest levels so the information we provide is accurate and dependable.
- ❤️ **Understanding** A financial strategy is only as good as the knowledge upon which it is built. We learn our clients' needs and desires so that our recommendations reflect their priorities.
- 🎓 **Education** Building wealth for a lifetime means building capabilities. We empower our clients with important tools and knowledge and provide precious peace of mind.
- 🔄 **Strategy** Plans require actions and actions require plans. Our strategic approach to financial management puts the right tactics in place to achieve our clients' goals.
- 🔑 **Trust** Trust is so valuable because it isn't given—it's earned. Every step of our process is an opportunity to prove our worth to our clients, and we prove it every day.

## Our Clientele

Folk Williams serves a diverse portfolio of clients around the globe. Our custom financial models help high-net worth individuals and families preserve their lifestyles and build legacies. We have particular expertise and longstanding experience in several client categories.

- ✓ Professional Athletes
- ✓ Entertainers
- ✓ Business Owners
- ✓ Medical Professionals
- ✓ Real Estate Investors