



# THOMAS BRADY & ASSOCIATES

## *G2 Life Insurance Partner*

Our strategic partners at Thomas Brady & Associates specialize in helping clients who have invested a great deal of time, energy, and resources into their life's work. Their strength is in their ability to provide custom strategies and solutions through superior personal service, integrity, and unmatched expertise.

Our clients enjoy the benefits of having a multidisciplinary senior team of advisors with backgrounds in the areas of insurance, law, accounting, and wealth management. This depth of experience and knowledge provides a highly collaborative platform that has become an effective addition to the G2 team.

Because they are a solutions-oriented company, Thomas Brady & Associates has a very simple philosophy: Understand what our clients are looking to accomplish and develop a plan to meet their unique objectives. Once that plan of action is established, we work alongside them to implement each step of the proposed strategy.

## SOLUTIONS

### *Estate Planning*

- Income Protection
- Irrevocable Life Insurance Trusts
- Leveraged Credit Shelter Trusts
- Grantor Retained Annuity Trusts
- Annuity/IRA Conservation
- Split-Dollar Life Insurance
- Family Limited Partnerships
- Qualified Personal Residence Trusts
- Asset Protection Strategies
- Private Financing Arrangements
- Long-term Care Insurance
- Charitable Planning

### *Business Planning*

- Buy/Sell Arrangements
- Key Person Planning
- Split-Dollar Life Insurance
- Non-qualified Deferred Comp
- Long-term Care Insurance
- Disability Income Protection
- Spousal Lifetime Access Trusts
- Supplemental Executive Retirement Plans
- Executive Bonus Plans
- DBO Plans

### *Connect with us:*

P + 415 426 6600  
F + 415 426 6601

connect@G2insurance.com  
www.G2insurance.com

G2 BENEFITS  
G2 SELECT  
→ G2 LIFE