SHORELINE
WEALTH MANAGEMENT
Your Financial Anchor

PRODUCTS AND SERVICES

At Shoreline Wealth Management we understand your individualized investment and financial planning needs. We utilize a vast offering of products, services and tools to tailor a plan specifically to meet those needs. As a fiduciary in advisory relationships, we also provide professional, personalized and independent advice, putting your needs and best interests first. Below is a list of all of the products and services Shoreline Wealth has to offer:

INVESTMENTS

- Mutual funds
- Stock and exchange-traded products (ETPs)
- Bonds and individual fixed-income securities
- Certificates of Deposits (CDs)
- Advisory solutions
- Structured notes
- 401k/403(b) Rollover Services
- Unit investment trusts (UITs)
- Options
- College 529 plans / Minor savings accounts
- Alternative investments
- IRAs and retirement plans

INSURANCE & ANNUITIES

- Annuities - fixed, indexed, variable and income
- Life insurance
- Long-term care insurance

BANKING & LENDING

- Cash solutions - dual checking brokerage account
- Secure Lending (through 3rd party bank)

PLANNING

- Financial planning
- Social security analysis
- Estate planning

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