



At JMR Financial Group our focus is to increase our client's net worth. We accomplish this through the inter-connected financial services that we offer. As a team, we will create a plan to lead YOU to

Growth. Profit. Success.

JMR FINANCIAL GROUP

JMRFG.com

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Growth. Profit. Success.

***One Firm -
One Focus***

**To Increase
Your
Net Worth**



For Individuals, JMR can:

- Answer your retirement planning questions
- Prepare a comprehensive financial plan
- Manage your investment funds
- Help you address your tax and estate planning
- Prepare your tax returns each year.

For Business Owners and Leaders:

- Design, implement and administer benefit plans for your employees
- Help you maximize your available funds while building a strong business and providing your employees a high level of satisfaction resulting in improved productivity.
- Provide tax preparation and planning services for sole proprietorships, partnerships, corporations, and s-corporations, as well as estates and trusts.
- Our customized packaged services offer:
 - Business Consulting
 - Financial Statement Analytics
 - Accounting, Payroll and Tax Services
 - QuickBooks Support

These services will allow you to efficiently manage your operations, grow your profits and achieve your desired business goals.

Accounting & Payroll Services

Let JMR Financial Group handle the details and provide you with accurate timely information to accelerate your path to **Growth. Profit. Success.** You focus on your business – let us focus on your books. We offer accounting packages designed to custom fit your organization's needs. All packages include support and are backed by a written service guarantee.

Employee Benefit Plan Administration

Trust JMR Financial Group to design, implement and administer an employee benefit program, such as a retirement plan or flex plan, for your business. Employee benefit plans offer both employers and employees significant tax advantages as well as other incentives and can improve overall employee retention.

QuickBooks Support

Our experienced accountants and CPA are also Certified and Advanced Certified QuickBooks ProAdvisors. Our services range from cleaning up QuickBooks files to designing customized accounting platforms. Let us help you support your organization's current and future accounting needs.

Income Tax Planning & Preparation

Along with the individual returns, we also offer tax services to partnerships, corporations, s-corporations, and estates or trusts. All return preparation includes calculation of succeeding year's estimated tax payments and e-filed returns.

Financial & Retirement Planning

Financial planning can be easy with the help of JMR Financial Group's qualified advisors. We will help determine your retirement needs and wants, set financial goals and plan steps to achieve your goals.

Investment Management

Our investment management service provides for the continuous daily management of investment assets for individuals, families or organizations who may lack the time, the expertise or the desire to actively manage their own investment program. Services are based upon your individual needs, goals and risk objectives.

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