

## AT THE HEART OF IT ALL: CLIENT-CENTERED WEALTH PLANNING

**YOUR DREAMS, GOALS, AND ASPIRATIONS ARE UNLIKE THOSE OF ANYONE ELSE. SHOULDN'T YOUR WEALTH PLANNING BE AS INDIVIDUAL, TOO?**

Of all the decisions you will make, choosing the right wealth planning team is possibly one of the most important. At Poise Wealth, we simplify complex financial planning strategies and provide you with the knowledge and tools to make informed decisions.

The Poise Wealth Team helps clients like you clarify your broader vision for your wealth by understanding your values and goals. Drew Besonson of Poise Wealth has made it his career to enhance and help clients achieve their financial goals by applying the pillars of financial planning and providing each client with a customized written financial plan.

Besonson's team builds and implements financial plans with a clear understanding of each client's personal, business, estate, and trust needs. His strength is in listening to clients, learning about their desires for the future, and integrating this into the entire planning process.

Creating a team environment centered on the clients' core values is at the heart of every relationship. This allows collaboration with other professionals, including the clients' current advisors, assuring clients an inclusive planning process.

Together, we will ensure your Planning Strategy is aligned with your goals, timeline, and tolerance for risk. You will benefit from: *Peace of mind knowing your life's work will continue to bring value to your Family and Community.*

Your plan includes investing time and energy for your family's future legacy in one or more of the following areas:



Minimized Estate Taxes, Trust Planning, Intergenerational Wealth Planning, Business & Succession Planning, and Tax Efficient Investing.

Creating your unique Plan involves a three-pronged approach:

- **Financial Independence:** We will develop solutions to meet your retirement and other personal goals to help ensure your financial well-being.
- **Family Legacy:** Guided by your personal values, we will work together to create a legacy plan reflecting “you” while providing financial and educational planning for generations to come.
- **Social Capital:** Together, we will design and develop your philanthropic vision and bring it to life with a focus on long-term asset preservation.

“We provide insight and education to address concerns such as how to move assets through multiple generations in the most tax-efficient manner,” says Besonson.

Besonson's enthusiasm for his chosen field is matched only by his dedication helping to ensure his clients receive the best financial advice and service. As an Advisor with Northwestern Mutual Wealth Management Company, he is able to provide the entire marketplace of products and resources.

Besonson's passion for helping others includes working with local nonprofits. He serves as a board member of Orchards Children's Services, which provides

needed services of family preservation and adoption. He also actively serves as a Beaumont Health Foundation Trustee, with a special interest in childhood illness research. Because of his commitment to these programs, Northwestern Mutual recognized him as a 2017 Community Service Award Winner.

With more than 20 years of experience in the financial services industry, Besonson knows the key to client satisfaction and commitment is a meaningful and impactful relationship in which the client is at the center of their planning.

“Our clients share with us they receive great comfort and confidence knowing we are continually anticipating and thinking about their potential needs,” states Besonson.

At Poise Wealth, we serve our clients. Our team of knowledgeable advisors is thorough, creative, and ethical.

*We care about your unique goals and work hard to implement solutions ensuring the best kind of success—yours.*

 **Northwestern Mutual**

POISE WEALTH

**Drew Besonson**  
Northwestern Mutual  
901 Wilshire Drive, Suite 300  
Troy, MI 48084  
248-244-6066 • [PoiseWealth.com](http://PoiseWealth.com)  
[Drew.Besonson@nm.com](mailto:Drew.Besonson@nm.com)