



WAHBY
FINANCIAL GROUP, LLC
helping build wealth for life

BUSINESS SERVICES

We offer a wide range of services designed to support business owners through every stage of the business lifecycle. By taking the time to understand your personal values, goals, and vision, we help create customized strategies—and more importantly, help you put them into action—so you can move forward with confidence.

Here's a look at some of the key ways we can help:

01

Executive Benefits

Your business is only as strong as the people leading it. A well-designed executive benefits package can help you attract, motivate, and retain the kind of talent that drives long-term success.

We can help with things like:

- Creating and funding non-qualified deferred compensation plans
- Designing supplemental retirement plans for key executives (SERPs)
- Setting up split-dollar life insurance arrangements
- Structuring executive bonus and retention plans
- Building incentive strategies that align leadership with business goals

02

Succession Planning

At some point, every business owner will transition out of their business. The question is—will it happen on your terms?

A solid succession plan helps you prepare for that transition while protecting your financial future and the legacy you've built.

We can help with:

- Developing an exit strategy and timeline that works for you
- Planning transfers to family members, key employees, or outside buyers
- Coordinating business valuations
- Structuring buyouts or ownership transitions
- Creating income and retirement strategies tied to your exit
- Exploring charitable or legacy planning options



03

Key Person Insurance

There are certain people in your business you simply can't replace overnight. Key person insurance helps protect your company financially if something unexpected happens to one of those critical individuals.

We can help by:

- Identifying key employees and assessing potential risk
- Structuring life and disability coverage
- Planning for business continuity and stability
- Protecting against lost revenue or disruption
- Providing resources to help recruit and train a replacement

04

Funding Buy-Sell Agreements

If you have business partners, a buy-sell agreement is essential. It outlines what happens if an owner exits—and funding it properly ensures there are no financial surprises when that time comes.

We can help with:

- Designing buy-sell agreements (cross-purchase or entity plans)
- Funding those agreements with life and disability insurance
- Making sure valuations are current and fair
- Planning for smooth ownership transitions
- Coordinating with your legal and tax advisors





05

Funding Deferred Compensation

Deferred compensation can be a powerful way to reward and retain key employees while giving them flexibility in how and when they receive income.

We can help with:

- Designing customized deferred compensation plans
- Creating funding strategies to support those plans
- Structuring vesting schedules and payout options
- Aligning benefits with long-term retention goals
- Helping make these plans both effective and sustainable

06

Group Employee Benefits

Offering strong employee benefits isn't just a nice-to-have—it's essential for attracting and keeping great people. We help you build a benefits package that works for both your business and your employees.

We can help with:

- Group health, life, and disability insurance
- Long-term care coverage options
- Retirement plans like 401(k)s and SIMPLE IRAs
- Employee education and financial wellness workshops
- Reviewing and optimizing your current benefits strategy





WAHBY
FINANCIAL GROUP, LLC
helping build wealth for life

PERSONAL SERVICES

01

Wealth Management & Investment Strategy

Effective investing isn't about chasing returns — it's about aligning your portfolio with your goals, time horizon, and risk tolerance.

We help you:

- Build an investment strategy aligned with your long-term objectives
- Manage risk thoughtfully across market cycles
- Integrate investments with your broader financial plan
- Maintain discipline during periods of market uncertainty
- Adjust your strategy as goals, cash flow, and life evolve



02

Retirement Planning

Retirement isn't a single event — it's a multi-decade phase of life that requires careful coordination.

We help you:

- Understand when you can retire and what it will take to get there
- Create sustainable income strategies for retirement
- Plan for healthcare, longevity, and lifestyle considerations
- Adjust your plan as markets and life evolve

03

Estate and Legacy Planning

A thoughtful estate plan ensures your wealth reflects your values and supports the people and causes you care about most.

We help you:

- Clarify your legacy goals and family priorities
- Coordinate estate strategies with your broader financial plan
- Work alongside legal and tax professionals to implement your plan
- Prepare heirs for responsible stewardship of wealth



WAHBY
FINANCIAL GROUP, LLC
helping build wealth for life

04

Philanthropic & Charitable Planning

Giving thoughtfully allows you to create impact while aligning charitable goals with your overall financial strategy.

We help you:

- Clarify philanthropic goals and priorities
- Explore tax-efficient giving strategies
- Integrate charitable planning into your long-term plan
- Structure giving for both immediate and lasting impact
- Coordinate with estate and legacy planning objectives

Let's start a conversation.

Contact us to schedule an appointment.

904-372-9997

Visit us online
www.wahbyfinancial.com



Robin Wahby is a Financial Adviser offering investment advisory services through Eagle Strategies LLC, a Registered Investment Adviser. She also is a Registered Representative offering securities through NYLIFE Securities LLC, Member FINRA/SIPC, A Licensed Insurance Agency.

Wahby Financial Group, LLC is independently owned and operated from Eagle Strategies LLC and does not provide tax, legal or accounting advice.