

ABOUT RAYMOND JAMES

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RJFS is a national financial services firm with more

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BASSETT, DAWSON & FOY, INC. WEALTH SOLUTIONS

E.A. DELLE DONNE CORPORATE CENTER
1011 CENTRE ROAD, SUITE 110
WILMINGTON DE 19805
Phone: 302-999-9330
Fax: 302-999-9440
website: www.bdfwealth.com

Bassett, Dawson & Foy, Inc. is a fee based financial solutions company established in 1985. We have an attorney on staff ready to assist you with your estate planning needs. Various associates at BDF are members of the following professional organizations:*

- ◆ The Investment Management Consultants Association
- ◆ The Society of Financial Service Professionals
- ◆ The Financial Planning Association
- ◆ The National Association of Insurance and Financial Advisors

CONTACT US

Frederick J. Dawson, ChFC, CLU
Wealth Manager, RJFS
President, BDF
fdawson@bdfwealth.com

Bradley J. Foy, CFP®
Wealth Manager, RJFS
Executive Vice President, BDF
bfoy@bdfwealth.com

Brian D. Dawson, ChFC, CIMC®
Wealth Manager, Branch Manager RJFS
Vice President of Operations, BDF
bdawson@bdfwealth.com

Scott Crosby, CFP®
Wealth Manager, RJFS
scrosby@bdfwealth.com

Tim O'Leary
Wealth Manager, RJFS
toleary@bdfwealth.com

Harriet L. Chappell, J.D.**
Estate Service Associate
hchappell@bdfwealth.com

**Estate planning services of BDF, Inc. are independent of Raymond James.*

***Ms. Chappell and the estate planning advice and services she offers are not affiliated with Raymond James.*

RJFS does not provide tax or legal advice. You should discuss any tax or legal matters with the appropriate professional.

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Certified Financial Planner Board of Standards Inc. owns the certification mark CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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Member FINRA/SIPC*



E.A. Delle Donne Corporate Center
1011 Centre Road, Suite 110
Wilmington, DE 19805
302-999-9330
www.bdfwealth.com

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Advisors, Inc.*

ABOUT OUR COMPANY

Financial Planning is a process... At *Bassett, Dawson & Foy*, our advisors start the financial planning process with identifying and prioritizing your specific financial objectives. Together, we determine short- and



long-term strategies that have the best potential for achieving your objectives.

We can then either assist in the implementation of your plan or coordinate our efforts with other professionals of your choice. In either case, we review the progress you are making and periodically review and revise our recommended actions to provide you with a dynamic, up-to-date, and comprehensive plan designed to meet your unique needs. With over 200 years of combined experience in the financial services industry and a strong commitment to your success, the partners and staff at Bassett, Dawson & Foy, Inc. are ready to provide you with the professional expertise and objectivity that will help invest, manage, and conserve your wealth. It is important to us that our clients are comfortable with each step of establishing their goals and implementing their financial plans. With this in mind, we have built our company with a philosophy of old fashioned service and satisfaction, striving to provide our clients with the highest level of service possible.

Visit us online at
www.bdfwealth.com

OUR ADVISORS OFFER

Investment services:

- ◆ Stocks
- ◆ Bonds / CD's
- ◆ ETF's
- ◆ Sustainable Investing / ESG
- ◆ Mutual Funds
- ◆ 529 Plans
- ◆ Private Portfolio Management
- ◆ Asset Allocation

Securities offered through
Raymond James Financial Services, Inc.
Member FINRA/SIPC

Retirement planning:

- ◆ Date Selection
- ◆ Retirement Income Analysis
- ◆ Lump Sum Distribution Analysis
- ◆ Rollover Education
- ◆ Monte Carlo Simulation

-At BDF you will enjoy independent unbiased service from advisors who are experienced credentialed professionals.

Tax management planning:

- ◆ Tax Planning
- ◆ Cash Management
- ◆ Executive Compensation
- ◆ Planning Including:
Stock Option Analysis and/or Incentive Compensation
- ◆ Stock Concentration Diversification

Insurance services:

- ◆ Life Insurance
- ◆ Disability Insurance
- ◆ Annuities
- ◆ Long-Term Care Insurance
- ◆ Hybrid Policies

Estate planning*:

- ◆ Current Estate Analysis
- ◆ Wills and Trust Planning
- ◆ Minimize Taxes and Administrative Costs
- ◆ Living Wills
- ◆ Durable Power of Attorney

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BASSETT, DAWSON & FOY, INC.
WEALTH SOLUTIONS *Since 1985