

Your Life's Work

It's our business, and we take it very personally.

For some of our clients, this may be family security, estate planning, charitable planning or retirement strategies. For others, it could be business sustainability, Long Term Care or Executive Benefits.

At Thomas Brady & Associates, we have built our business around our passion for creating and protecting the value of our clients' most precious assets: family, their businesses, relationships, lifestyle and their legacy.

Thomas Brady & Associates is an independent insurance firm with three primary areas of focus. We specialize in all areas of (1) estate planning, (2) business planning and (3) insurance review and placement. We do not manage assets, draft documents or do any tax and audit work, but we do collaborate with our client's professionals in these areas to assure that they are implementing the best possible plan for their family or business. We have a team of experts with extensive knowledge in tax, advanced marketing concepts, actuarial, underwriting advocacy and insurance products & placement and work very closely with high net worth families on their estate planning needs.

We do not charge a flat or hourly fee to work with our team. We are paid if and when insurance makes sense and would ask that our potential clients allow us to represent them in placing the insurance, if the need should arise. We are not tied to any one insurance company and have the ability to use our relationships with many different insurance companies to work towards the best possible underwriting offer, company, design and price.

We serve primarily affluent individuals, families and business owners and take great pride in cultivating life long relationships with our clientele. That said, there is no client too big or too small, and our philosophy has always been that if the need is important to you, it is important to us.

Few firms can offer the high level of personal service, depth of expertise and specialized knowledge in the areas of individual, business and estate planning.

With offices in San Francisco, Orange County and Boston, along with a vast network of strategic partners and resources around the country, Thomas Brady & Associates can provide custom strategies and solutions for all of your wealth preservation needs.

The Brady Way

IT'S THE INTANGIBLE, UNDERSTATED, OFTEN INVISIBLE manner in which we conduct our business. It's a deep desire to create positive experiences and outcomes for everyone we work with. It's a shared value system that is held in high regard by everyone who is associated with Thomas Brady & Associates. It's an experience that we strive to deliver to our clients on a daily basis.

Knowing and caring for people, loyalty, integrity, professionalism, teamwork, humility, strong work ethic, family, friendships, helping others ... all hallmarks of The Brady Way.

While our expertise lies in the areas of wealth preservation, insurance and estate planning, we truly consider ourselves to be in the relationship business. We believe it's incredibly important work because we believe your life's work is incredibly important, and it's our responsibility to protect it.

Founder Thomas Brady credits his parents for shaping who he is today and how he has chosen to run the business. The Brady Way has deep roots and can be found in each and every employee and in every interaction with our valued clients.



Solutions

OUR CLIENTS HAVE INVESTED A GREAT DEAL OF TIME, energy and resources into their life's work. They are established individuals, families and businesses who have created significant wealth, both tangible and intangible.

Our strength is in our ability to provide custom strategies and solutions through superior personal service, integrity and unmatched expertise. Our clients enjoy the benefits of having a multi-disciplined, senior team of advisors with backgrounds in the areas of insurance, law, accounting and wealth management. This depth of experience and knowledge provides a highly collaborative platform that can become an effective addition to our client's existing advisory team.

As a "solutions-oriented" company, Thomas Brady & Associates has a very simple philosophy: Understand what our clients are looking to accomplish and develop a plan to meet their unique objectives. Once that plan of action is established, we work with the client's group of professionals to implement each step of the proposed strategy.



ESTATE PLANNING

- Income Protection
- Irrevocable Life Insurance Trusts
- Leveraged Credit Shelter Trusts
- Grantor Retained Annuity Trusts
- Annuity/IRA Conservation
- Split Dollar Life Insurance
- Family Limited Partnerships
- Qualified Personal Residence Trusts
- Asset Protection Strategies
- Private Financing Arrangements
- Long Term Care Insurance
- Charitable Planning



BUSINESS PLANNING

- Buy-Sell Arrangements
- Key Person Planning
- Split Dollar Life Insurance
- Non-Qualified Deferred Comp
- Long Term Care Insurance
- Disability Income Protection
- Spousal Lifetime Access Trusts
- Supplemental Executive Retirement Plans
- Executive Bonus Plans
- DBO Plans

INSURANCE REVIEW & PLACEMENT

- Independence – Access to Multiple Insurance Carriers
- Comprehensive Policy Reviews
- Trust Owned Life Insurance Review
- Underwriting Advocacy
- Vital Signs and Carrier Solvency Analysis
- Insurance Implementation
- Life Settlements

Meet Our Team

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For additional information on our team members please visit our website;
www.tbradyandassociates.com



THOMAS BRADY & ASSOCIATES
creating and protecting your life's work