

Major League Investments, Inc.
530 Loring Avenue, Suite 302
Salem, MA 01970

Phone 978-740-1011
Fax 978-744-8240
Email info@majorleagueinvest.com

Major League Investments, Inc.

WE INVEST IN OUR CLIENTS

Private Wealth Management

Family Office and Concierge Services

Comprehensive Financial Planning

Investment Planning and Wealth Management

Retirement Planning and Income Distribution

Tax and Estate Planning

Insurance Planning

Philanthropic Services

Business Owner Planning and Management Services

Financial Event and Crisis Management

CORPORATE OVERVIEW

Major League Investments, Inc., which was founded in 1996, is a fee-based Registered Investment Advisor that provides comprehensive wealth management and family office services to a diverse range of high profile domestic and international clientele, including corporate executives, professionals, entrepreneurs, business owners, military personnel, sports and media celebrities, high net worth families and other individuals of substantial income or assets.

PERSONAL INTEGRITY AND TRUST, UNBIASED ADVICE, UNCOMMON EXPERIENCE

Major League Investments seeks to help clients achieve their personal financial and life goals, their independence and security, through the use of comprehensive and objective personal financial planning and customized investment planning and management. The firm prides itself on:

- *the personal integrity and technical knowledge of our team, which has more than 40 years of personal financial planning and investment management experience, and*
- *the trust our clients place with our team and our firm.*

CORE VALUES

Major League Investments operates under the following core principles:

Fit *Using a thorough personal data gathering process, Major League Investments strives to identify and work with clients whose wants and needs are a perfect match for our services and style.*

Personal Attention *Major League Investments strives to meet and exceed client expectations. To that end, Major League Investments assigns a team of dedicated financial planners and investment managers to each client. Major League Investments also offers clients the opportunity to establish the criteria, preferences and standards for communication and reporting.*

OVERVIEW OF SERVICES

FAMILY OFFICE AND CONCIERGE SERVICES

Major League Investments provides comprehensive family office planning services that range from bill paying to contract negotiations to services related to any and all expenditures that can impact a client's quality of life and standard of living. Major League Investments also provides "concierge-style" services that represent our effort to exceed our client's expectations.

COMPREHENSIVE FINANCIAL PLANNING

A comprehensive personal financial plan is the cornerstone of every successful client relationship at Major League Investments. And every plan adheres to CFP Board of Standards, Inc.'s financial planning process, which is comprised of the following six steps:

1. *Establish and define the client-planner relationship.*
2. *Gather client data, including goals.*
3. *Analyze and evaluate financial status.*
4. *Develop and present financial planning recommendations and/or alternatives.*
5. *Implement the financial planning recommendations.*
6. *Monitor the financial planning recommendations.*

At Major League Investments, the result of this process is a plan that guides decisions affecting every aspect of a client's life, including cash flow, real estate, investments, taxes, retirement, and estates.

INVESTMENT PLANNING AND WEALTH MANAGEMENT

Whether it's saving and investing for retirement or a child's college education, Major League Investments creates and manages investment portfolios that are tailored to our client's specific financial goals, tolerance for risk, time horizon, and stage of life (Accumulation, Preservation or Distribution). Using a state-of-the-art Investment Policy Statement, each portfolio is designed to produce the results that meet or exceed client expectations.

TAX AND ESTATE PLANNING

Major League Investments, which has extensive experience with personal and corporate income and estate tax planning issues, develops and implements financial and investment plans in the most tax-efficient and prudent manner possible.

FINANCIAL EVENT AND CRISIS MANAGEMENT

At Major League Investments, we understand that people often turn to a financial planner in times of need or crisis, the birth of a child or grandchild, the death of a spouse or parent, a change in employment status. No matter the circumstances, Major League Investments offers just-in-time financial planning and investment management services that address specific needs and problems.

PHILANTHROPIC SERVICES

Major League Investments understands that our clients have ambitious and complex charitable giving objectives. At Major League Investments, we help our clients create customized charitable giving solutions that maximize available tax benefits and provide the personal satisfaction that comes with giving.

PRIMARY AND TEAM PLANNING SERVICES

Major League Investments is skilled at serving as the primary financial care provider or serving as the leader of a team of multi-disciplinary professionals.

ONLINE ACCESS

Investors today demand access to information, especially investment information. As part of an effort to provide state-of-the-art services, Major League Investments today provides clients with full access to their investment accounts, stock quotes and education at its web site:

www.majorleagueinvest.com.