Services

When it comes to making important decisions in your financial life, the choices you have today is infinite and complex. Right decisions at the right time will help you navigate competently through the life stages of employment, marriage, setting up home, parenting, educating children, retirement, and all the uncertainties in between- death, disability, critical Illness, redundancy…..An unwise decision may lead to severe consequences, unexpected expenses and unprepared for the life's surprises. The conscious and scientific management of your financial circumstances will enable you to anticipate opportunities, allocate your savings and assets wisely and prepare fot the contigencies.Hence it's essential that you have an advisor who can deliver sound insights into your financial management while respecting your situation and considering your interests first.

Our trained and qualified advisors ensure that you and your goals are our focus. Coordinating the ideas and insights of an array of professionals from both inside and outside Buff and Lean —including your banker, accountant and other advisors, we create a new roadmap to success and peace of mind for you, your family and business.

Advisors

Supporting your Financial Advisor are credentialed specialists who represent a wide range of strategic approaches and exclusive services. Whatever financial goals you set, Buff and Lean offers you experienced professionals who are committed to comprehensive planning that take into account your circumstances, values, objectives and risk tolerance.

Financial Analysis and Planning

Achieving your financial goals starts with a plan. By taking the time to understand your larger goals and priorities, your Advisor can help to strategically map out your financial future and unearth the shortfalls in your financial planning by using the best available methods in the world .

Strategies

Once you reach a certain level of financial success, the financial opportunities available to you need intensive care. Unwise decisions can cost you substantial amounts. We offer a complete range of services to meet your needs and help you build strategies to manage your wealth successfully by understanding your vision and values.

Proven strategies, in depth analysis, stringent risk management and sound asset allocation keep your portfolio moving toward your financial goals.

Estate Planning

We'll help you develop an effective succession plan and periodically review your estate plan to ensure it continues to meet your changing needs and circumstances.

This reserves your legacy by maximizing the value of your estate through objective guidance supported by 50 years of collective experience.

Asset Allocation

It’s an investment strategy that aims to balance risk and reward by apportioning a portfolio's assets according to an individual's goals, risk tolerance and investment horizon.

Our expertise in managing different class of assets and exposure to world class solutions offer you cost saving and time tested advice on allocating your assets.

Insurance Services

We assess the risks needed to be protected in your life and business with a genuine quest for details and applying proven techniques. With our insurance solutions that protect you, your estate, and/or your business from unforeseen circumstances, we guarantee a total peace of mind for you and your family.

Business Services

Protect your goals and future plans. With strategic business risk management, estate planning, valuation and continuation plans

Financial plans must be dynamic to meet the evolving needs of your lifetime. In addition to regular communication throughout the year, in-person meetings each year with us create a forum for analyzing the past year's financial performance and proposing strategies for the future. At this meeting, your Advisor will lead a review of the past 12 months' activities with you to develop strategies for the next year. Participants include your Buff and Lean advisors and any external advisors you'd like to invite.

Whatever your particular circumstances, we have the experience to help our clients protect, grow, and transfer their wealth. We can help you, too