

Insurance Services

We have an in-house brokerage for Insurance. It is an essential tool for Risk Mitigation. It offsets liabilities & protects families when emergency strikes. Today, insurance is used for Retirement & Financial planning, since it is not dependent on Wall Street. Insurance provides guaranteed outcome.

Financial Planning

We look at all the elements of an individuals/business's financial life cycle to come up with strategies that will help meet the needs of their aspirations and goals.

Tax Planning/Strategy

Tax planning is an essential aspect of an individuals/business's financial plan. We provide strategies that will help reduce tax liabilities and maximize your ability to contribute to your retirement plans.



Core Family Office

Real Estate

We have an in-house Real Estate brokerage. We help with buy/sell/development of Commercial & Residential properties all across the United States. Core assists in forming Family/Friends Syndicates and helping build true wealth.

Loans/Financing

We have an in-house brokerage for all Residential & Commercial Real Estate/ Business/Refinancing financing needs. Private/Hard money options are available for Fix/Flip/rehab projects.

Business Advisory

We assist you with all aspects of your business from managing the finances, helping you market your services, improving day to day operations and much more.