RUSHTON
WEALTH MANAGEMENT

FINANCIAL PLANNING

Rushton Wealth Management provides tax-centric financial planning for individuals and businesses.

SPECIALIZED SERVICES INCLUDE:

- Financial planning
- Investment planning
- Retirement planning
- Education investment planning
- Cash flow analysis
- Accumulation strategies
- Risk planning (such as life insurance, long-term care insurance, and disability insurance)

"CLOSING THE CIRCLE" TO BETTER SERVE CLIENT PARTNERS

Rushton Wealth Management was founded by Rushton, LLC, a well-respected certified public accounting and business consulting firm based in Northeast Georgia that serves clients throughout the state as well as internationally.

Rushton Wealth Management is led by Elisabeth Baldwin, CWS, CDFA , Director of Financial Services, and Perry Barnett, CPA, PFS, an experienced tax specialist and longtime partner with the Rushton accounting firm.

The CPA firm and Rushton Wealth Management work together as a team to "close the circle" to provide more comprehensive, coordinated tax-centric financial planning for Rushton clients.

Rushton Wealth Management addresses a number of critical issues faced by clients in achieving personal and business goals:

- Do I have enough invested for retirement?
- Am I taking on too much or too little risk?
- How will I pay for my children's or grandchildren's education?
- How can I protect my spouse and family if something happens to me?
- Is the retirement plan I offer to my employees the correct structure?
- What financial legacy will I leave for my family?

PARTNERSHIP WITH 1ST GLOBAL CAPITAL CORPORATION

Rushton Wealth Management is a partner with 1st Global Capital Corporation, a broker-dealer that provides exclusive support to CPA, tax and estate planning firms in the wealth management industry. Through 1st Global, clients will have access to a vast array of financial products ranging from securities to life insurance.

OUR TEAM

Elisabeth Baldwin, CWS, CDFA
Rushton Wealth Management
Director of Financial Services
ebaldwin@rushtonandcompany.com

As Director of Financial Services at Rushton Wealth Management, Elisabeth Baldwin specializes in helping clients align their financial lives to their values and life goals. She focuses on a foundation of financial planning and helping her clients grow, preserve and transfer their wealth in the most tax efficient manner possible.

CERTIFICATIONS: Certified Wealth Strategist
Certified Divorce Financial Analyst

SPECIALIZING IN: Financial Planning, Investment Planning, Retirement Planning, Education Planning, Cash Flow Analysis
Accumulation Strategies, Risk Planning, including life insurance, long-term care and disability

Perry Barnett, CPA, PFS
Rushton Wealth Management
pbarnett@rushtonandcompany.com

Perry Barnett is a specialist in tax and estate planning in addition to international business, business formation and succession planning. He also serves as a partner with the Rushton firm where he heads the Business Services division.

DESIGNATIONS: Certified Public Accountant, 1993
Personal Financial Specialist

METHOD 10®
Comprehensive Financial Solutions

RUSHTON
WEALTH MANAGEMENT

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