NC Financial Group

Advising Clients, One Step at a Time

www.ncfinancialgroup.com

Services for Individuals & Families

Investments
- Fee-based Asset Management Services
- 529 Plans, Coverdell, UTMA
- IRAs (Roth, SEP, Simple), 401(k), Solo 401(k)

Estate Planning
- Charitable Remainder Trusts
- Business Ownership Succession Plans
- Insurance Needs Analysis

Insurance
- Annuities, Disability, Health, Life, Long Term Care

General Accounting & Tax Services
- Tax Planning & Preparation
- Year-end Planning & Quarterly, Mid-year Projections

Real Estate
- Mortgage, Refinance
- Purchase, Sell

Nicholas Casagrande, EA

We offer full-service wealth management guidance for individuals, families and businesses in the following areas:

Taxes - Investments
Insurance - Real Estate

Securities Registrations and Affiliations
- Registrations: Series 7, Series 63, Series 65
- State of California Health and Life Insurance
- California Department of Realtors
- National Association of Enrolled Agents
- California Notary Public

Community Service
- Board of Directors - United Policyholders

Education
- Dominican University, San Rafael, CA
  - B.A. Mathematics, minor Chemistry

Business Offerings

NC Financial Group Offers a comprehensive suite of employee benefits that are easy to manage for the employee as well as the HR team.

Accounting Offerings
- Business Strategies, Growth
- Tax Planning & Preparation
- Year-end Preparation & Projections

Health Solutions
- Individual & Group
  - Medical, Dental, Vision

Retirement Plans
- 401(k), IRAs (Roth, SEP, Simple)

Payroll/Bookkeeping
- Onsite or Remote

San Francisco County
22 Battery Street, Suite 401
San Francisco, CA 94111
P 415.480.3669
F 415.480.3668

Marin County
5643 Paradise Drive, Suite 4
Corte Madera, CA 94925
P 415.480.3669
F 415.480.3668

Mendocino County
675 South Main Street
Willits, CA 95490
P 855.240.6606

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Wealth Management Taxes | Investments | Insurance | Real Estate | Payroll & Bookkeeping