



TRUSTMD CORP.

YOU TAKE CARE OF THEM, WE TAKE CARE OF YOU

Present

VALUES & BUSINESS PROPOSITION

Financial / Insurance / Strategy / Consulting

Presented by : Our Group Companies



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OUR MISSION & VISION

Plan, Create, and Grow.

Mission

Utilizing our dynamic implementation process, Trust MD's mission is to deliver a tailored, unbiased and innovative solution to our client's current and future financial needs based on facts, analysis and thorough examination delivered through our firm and sister companies.

Vision

To become the primary resource for financial services, Insurance planning, tax-reduction and capital protection strategies, for our country's medical doctors and business owners; while expanding furthermore our clients outside of Puerto Rico.



WELCOME MESSAGE

Plan, Create, and Grow.



Welcome to Trust MD Corporation; it is our pleasure to serve you. Be confident that our business culture will forever be to create the best conditions to deliver a unique and tailored advice for each of our clients. It is a great honor to have you today, tomorrow and always.

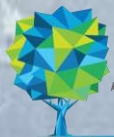
Alexis J. Miranda-Aguayo
President & CEO



ABOUT US

Plan, Create, and Grow.

Trust MD Corporation is a financial services company established in San Juan, PR, specialized in designing and implementing tailored financial strategies such as retirement planning strategies, capital protection strategies, advanced tax-reduction strategies, investments and risk management strategies. Trust MD Corporation is a conglomeration of interdisciplinary professionals, all with a unique expertise and diverse backgrounds in finance, Insurance, economics, tax, legal and risk management.



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ADDED VALUE

Plan, Create, and Grow.

Our biggest accomplishment has been to differentiate ourselves from the rest prioritizing and focusing on our client's needs and wants. In order to guarantee a fully comprehensive delivery, Trust MD Corporation has developed business alliances with different partners such as Private Equity Solutions, LLC, Lyon Bern, LLC & Integrated Financial Compass, LLC; all with its unique expertise in the financial industry.



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WE BEHAVE AS A FAMILY PRACTICE

Plan, Create, and Grow.

In order to deliver a comprehensive and holistic solution to our client's needs, we rely on each of our business partners and their unique expertise. No solutions are biased, rather based on factual data obtained from rigorous analysis in regards to every detail concerning the problem and the solution.

01



Trust MD

Financial services, analysis and financial products provider.

02



FinHealth

Consulting firm.

03



Lyon Bern

Wealth & Asset Management.

04



PES

Real Estate private equity firm.



Our Services

Plan, Create, and Grow.

Furthermore, we see a great opportunity in developing the following services:

01 Life Insurance Planning, Disability Insurance Planning & Long Term Care Planning & Financial Planning for your children

02 Business Succession Planning

03 Comprehensive Financial Planning, Wealth Management Strategies & Advanced Personal Financial Analysis

04 Qualified Plans (401(k), Pension Plans & Keogh Plans)

05 Employee Benefits initiatives



NON-QUALIFIED DEFERRED COMPENSATION

Plan, Create, and Grow.



01 An advanced strategy to remunerate an organization's highly-compensated executives could with the implementation of a non-qualified deferred compensation plan. In a Deferred Compensation plan, the organization (employer) and the executive agree to “defer” some of its high income in the future, thus also deferring their income taxes on those incomes. The deferred compensation could be invested into a tax-advantaged strategy, allowing for a more favorable tax bracket in the future.

QUALIFIED PLAN DESIGN & ADMINISTRATION

Plan, Create, and Grow.

We help our small and large businesses owners design and implement the most advanced and cost-effective qualified retirement plans such as:

01 Defined Benefit Plans

Tailored individual or corporate pension plans with the possibility of higher tax-deductible plan contribution.

02 Defined Contribution Plans

Individualized retirement plans, tailored to each client's needs.



BONUS AND DOUBLE BONUS EXECUTIVE PLANS (IRC) 162

Plan, Create, and Grow.

01

Executive Bonus Plans allow businesses to compensate their high-income & key executives with additional income which can be deposited into a tax-advantaged product as the life insurance with cash values. Contrary to the NQDC, bonus plans generate taxable income to the executive, therefore the 'double bonus' is used by the employer to pay the executive's tax burden created by the additional compensation.



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LONG TERM CARE PLANNING

Plan, Create, and Grow.

01 The rising costs of medicine, nurses and nursing homes, combined with a longer life expectancy, has made it extremely important for our clients to begin planning to mitigate the risk of loss of capital due to the high costs of long-term care. Our products and services allow our clients to have a capital injection to their assets provided by 'Long Term Care Insurance' products and asset protection strategies.



BUSINESS SUCCESSION PLANNING

Plan, Create, and Grow.

Only a few organizations take into consideration succession planning within their business. Utilizing our advanced advisory services, our team can assess the readiness of business owners and top executives for business succession or risks associated with an event with a key member of their business. are certain that there is an immense necessity for business succession planning. Our team of legal and financial experts help our clients by guiding them through this complicated process and recommend the best alternative for their needs



COMPREHENSIVE FINANCIAL PLANNING & ADVANCED PERSONAL FINANCIAL ANALYSIS

Utilizing Trust MD Corporation's Dynamic Implementation Process, we help our clients design and implement a comprehensive financial plan focused on achieving our client's financial needs.

Dynamic Implementation Process



INTEGRATED FINANCIAL COMPASS SERVICES

Plan, Create, and Grow.

DRAFT



- Financial projections
- Recommendation on legal structure
- Educational Financial Videos
- Recommendation of basic defensive strategies
 - F.A.Q.

Get Now

ALL STAR



- Everything from the draft +
 - Cash Flow Analysis
- Contributory Reconciliation
 - Investment portfolio diagnosis
- Comprehensive Financial Planning
 - Access to real estate services in P.R. and Florida

Get Now

HALL OF FAME



- Everything from the All Star +
- Investment portfolio analysis with alerts and follow-up
- Account integration and consolidation platform
- Access to several of private capital and financing

Get Now



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WORKING TOGETHER

Plan, Create, and Grow.

Financial Services

**Representatives & our team
will combine forces in order to
further expand our reach and
clients in the state of Florida
while expanding our current
market share in the island of
Puerto Rico.**





EMPLOYEE BENEFITS

Plan, Create, and Grow.

As “employee benefit” and “Golden Handcuffs” strategy for key executives, and as a way for the employers to differentiate themselves by offering additional added value; we could design a customized financial consulting “menu like” plan, tailored to each executive needs. Trust MD will work together with each employer in designing each plan offered to the employer and its executives.



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