



## Barone Financial Group

**Erick Barone**

400 Pinner Weald Way

Suite 102

Cary, NC 27513

[ebarone@ft.newyorklife.com](mailto:ebarone@ft.newyorklife.com)

[www.baronefg.com](http://www.baronefg.com)

(919)234-1720

The following products and services are just some of the ways we help our business clients:

- Key Person Insurance
- Business Exit Strategies
- Marketability Assements
- Tax Diversification
- Retirement Income Planning
- Business Valuations
- Executive Compensation Options
- D&O Insurance\*



At Barone Financial Group we have a combined 50 years' experience in helping businesses in our community answer some important questions:

- What is my business worth today?
- What will it be worth in 10 years from now?
- How am I positioned to unleash its value when I'm ready to retire or sell my business?



We take a long-term view with our clients helping them to realize and achieve their financial goals. One of our differentiators is an industry leading planning resource called The Nautilus Group®. Nautilus is an exclusive membership based resource accessible to an elite group of approximately 200 experienced insurance and financial industry leaders who are firmly committed to a team planning concept. Nautilus Members work with affluent, high net worth and business owner clients, professional athletes, professional entertainers, farmers and ranchers, physicians, corporate executives and retired executives.

\*Products available through one or more carriers not affiliated with New York Life Insurance Company, dependent on carrier authorization and product availability in your state or locality. Erick Barone, Member Agent, The Nautilus Group is a service of New York Life Insurance Company. Barone Financial Group is independently owned and operated from New York Life Insurance Company and its affiliates.