



Avisen provides a range of services to meet the needs of corporate executives and their employees, as well as institutional clients including endowments and foundations.

### **Corporate Services**

Our advisors work with small-to-large business owners, corporate executives and their employees on services including:

- Cash Management Services
  - 401K Plans
  - Pension & Profit Sharing Plans
  - SEP IRA Plans for self-employed business owners
  - Corporate Executive Service
  - 144 Sales
  - Options
  - Risk Management
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- Corporate Stock Buy Back

### **Institutional Services**

We work closely with endowments and foundations and help these organizations with items unique to their structure. Institutional services may include working closely with Trustees on investment solutions, portfolio design, manager research and consultation, and performance monitoring.