

# Sarah M. Cato, CFP®, CeXP®, ChFC®, CLU®, RICP®

Business Exit Planning, Retirement Income Planning, Comprehensive Financial Planning, Tax & Estate Plan Coordination

Best of Bethesda Award for Financial Planning for 2017

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

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Having developed and/or served as the CEO of 4 mid-market companies prior to becoming a Financial Advisor over 14 years ago, I believe that only by understanding and integrating one's financial strategies from a 360 degree perspective, can the best possible outcome be achieved. Because their most important asset is usually their business, this holistic view is particularly important in helping my business owner clients achieve optimal financial security. Protecting and enhancing equity and turning it into cash at the right time can often mean the difference between a secure financial future and a future filled with worry. My responsibility is to help my clients ensure their maximum wealth potential through strategic design, not just product selection. My 360 degree process examines each aspect of a client's financial picture inclusive of their business, integrating each area into a well-coordinated strategy, unique to achieving their goals and values. Working with my clients and their professional advisors, I help them reduce costs, design tax strategies, reduce financial plan risks, and help bring financial balance, now and in the future.

**Specialties:** Business Exit Planning, wealth protection, wealth accumulation, retirement income planning, business succession design/execution, executive and key person benefits design/implementation, business risk management

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