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BTA FINANCIAL GROUP is an independent financial services firm that specializes in wealth management and financial planning. We provide tailored solutions, unfiltered advice and we are always committed to trust, integrity and accountability.

We offer an extensive product and services menu which includes Comprehensive Financial Planning, Investment Management, Insurance Planning, Corporate Retirement Plans and Employee Benefits.

For additional information about our company or to set to set up a consultation, please call our office at (913) 831-1551.

products and services

FINANCIAL SERVICES

INDIVIDUAL FINANCIAL SERVICES

- Financial Planning
- Individual Investment Advisory
- Wealth Management
- Education Planning
- Retirement Planning
- Individual Retirement Accounts (IRA)
- Roth IRAs
- IRA Rollovers
- Annuities
- Capital Needs Analysis
- Asset Protection Strategies
- Estate Planning Services
- Tax Planning Services

CORPORATE FINANCIAL SERVICES

- Corporate Investment Services
- Business Continuation Planning
- Buy-Sell Strategies

INSURANCE SERVICES

INDIVIDUAL INSURANCE PRODUCTS

- Individual & Family Health Insurance
- Medicare Supplements
- Life Insurance
- Disability Insurance
- Long Term Care Insurance
- Property & Casualty Insurance

CORPORATE INSURANCE PRODUCTS

- Life Insurance
- Disability Insurance
- Buy-Sell Funding
- Business Overhead Expense Insurance
- Property Insurance
- Commercial General Liability
- Professional Liability / Errors & Omissions
- Commercial Auto
- Worker's Compensation
- Bonds

EMPLOYEE BENEFITS

EMPLOYER SPONSORED GROUP BENEFITS

- Health Insurance
- Life Insurance
- Dental Insurance
- Short Term Disability Insurance
- Long Term Disability Insurance
- Vision Insurance
- Long Term Care Insurance
- Voluntary Employee Paid Benefits

RETIREMENT PLAN SERVICES

- 401(k) Retirement Plans
- Profit Sharing Plans
- Simplified Employee Pension (SEP)
- SIMPLE IRA
- Individual 401(k)
- Defined Benefit Pension Plans
- 403(b) Retirement Plans
- Non-Qualified Retirement Plans
- Investment Policy Statement Preparation
- ERISA Section 404(c) Education

EXECUTIVE FRINGE BENEFIT PLANS

- Non-Qualified Deferred Compensation Plans
- Split-Dollar Life Insurance Plans
- Group Life Carve Out Plans
- Supplemental Disability Plans
- Long Term Care Programs
- Salary Continuation Plans

CONSULTING & VALUE ADDED SERVICES

- Benefit Plan & Risk Analysis
- Plan Design & Implementation
- Prescription Benefit Analysis
- HR Tools & Benchmarking
- COBRA & HIPAA Compliance Administration
- Section 125 Cafeteria Plans
- Employee Communications
- Enrollment Services
- Employee On-line Self Service and Portal Development
- Employee Surveys
- Employee Assistance Programs / Work-Life
- Wellness Programs