



Understanding your goals is the first step, we can help.

Whether you are just starting to invest, thinking about retirement, or need to review your current investment strategy, our experienced team will help you prioritize your goals and develop an appropriate approach tailored to your situation.

The Fiduciary Standard

In a relationship where you are partnering with an advisor to manage your finances, trust is a critical part of the equation. That's why it always helps to look for a financial advisor that is held to a fiduciary standard, abiding by fiduciary duty, puts the client's best interest before his/her own. Fiduciary duty helps to provide transparency and infuses the relationship with trust.

Our LPL Financial Advisors are dedicated to putting our clients' best interest **FIRST**.



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Community **FIRST**

Investment Group

Here for your now • Here for your future



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Not FDIC Insured by FDIC or any Other Government Agency	Not Bank Guaranteed
Not Bank Deposits or Obligations	May Lose Value

Individual Solutions

A well-grounded financial plan is essential for anyone who wishes to accomplish specific financial objectives. Whether it be the idea of owning your home, making sure your children's education is well funded, or ensuring a smooth and stress-free retirement; all of these seemingly disparate components come together under a unified financial plan.

Retirement Planning

- 401k Rollovers
- IRA & Roth IRA's
- Streamlining Retirement Accounts

Strategies

- Retirement Income
- Asset Allocation
- Risk Management

Assessments

- Risk Tolerance
- Time Horizon
- Investment Goals

Financial Planning

- Investment Guidance

College Savings

- 529 Plans

Insurance Needs

- Life
- Long - Term
- Disability

Small Business Solutions

Small Business Retirement Plans

Simple IRA

Savings incentive match plan for employees

- Flexible contributions
- Minimal administration
- 100 or less employees
- Employees contribute
- Employer required to contribute

401 (K)

Retirement savings plan sponsored by an employer

- 30 or more employees
- Employees contribute
- Employer not required to contribute

SEP-IRA

Simplified employee pension

- Easy set up & administration
- Ideal for small businesses or self-employed individuals
- Employer required to contribute

Key Man Solutions

Protect your business from the loss of key contributors

Employee Retention Strategies

Financial wellness and benefits

Succession Planning

Voluntary Life Insurance

Program Features

A great expansion of benefits at no direct cost to the company and policies that can be tailored to each employee's needs.

- Guaranteed issue for groups with 15+ eligible employees
- Coverage available to family members without purchase of personal insurance
- On-site enrollment with an insurance professional

