



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, when providing advisory services. 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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Rev. 1/4/24

Securities and advisory services are offered through LPL Financial (LPL), a registered investment advisor and broker-dealer (member FINRA/SIPC). Insurance products are offered through LPL or its licensed affiliates. Community First Bank and Community First Investment Group **are not** registered as a broker-dealer or investment advisor. Registered representatives of LPL offer products and services using Community First Investment Group, and may also be employees of Community First Bank. These products and services are being offered through LPL or its affiliates, which are separate entities from, and not affiliates of, Community First Bank or Community First Investment Group.

Securities and insurance offered through LPL or its affiliates are:

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

LPL Financial

Community First
Investment Group



Community First Investment Group and LPL Financial are separate entities.

Individual Services

We provide tailored financial strategies to support you through every stage of life, empowering you to make informed decisions with confidence.

Retirement Planning

- 401(k) Distribution Options
- Traditional & Roth IRAs
- Consolidation of Retirement Accounts

Financial Planning

- Customized Investment Guidance
- Retirement Income Planning
- Asset Allocation Guidance
- Risk Management Solutions
- College Savings Plan (529 Plans)

Insurance Solutions

- Life Insurance
- Long-Term Care Coverage
- Disability Insurance

Trust & Estate Planning

Small Business Services

You've built something great—now let's help it grow. Our small business solutions are designed to support you and your team with retirement plans, employee benefits, and retention strategies that make a lasting impact.

Retirement Plan Options

Simple IRA

A Savings Incentive Match Plan for employees

- Flexible contributions
- Minimal administration
- For businesses with 100 or fewer employees
- Employees contribute
- Employer contributions required

401(k)

Employer-sponsored retirement savings

- Ideal for businesses with 30+ employees
- Employees contribute
- Employer contributions optional

SEP-IRA

Simplified employee pension

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

Business Continuity & Employee Benefits

Succession Planning

Ensure a smooth transition for leadership and ownership changes.

Key Man Solutions

Prepare for the unexpected loss of key contributors to your business.

Employee Retention Strategies

Boost morale and loyalty with financial wellness programs and meaningful benefits.

Voluntary Benefits

Enhance your employee benefits package with customizable options—at no direct cost to your business. These programs are designed to support employee well-being and retention.

Voluntary Life Insurance

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

Supplemental Coverage

- Voluntary disability insurance and other supplemental benefits
- Helps employees manage out-of-pocket expenses due to illness or injury
- Flexible options tailored to individual needs