



The accountant who **saves you money**
is now the advisor
promoting prosperity.



Financial Group, LLC

The Advisors Adding Value to Accounting

And why shouldn't it be that way?

As your assets have grown, you've grown to trust and confide in your CPA. What was once a casual financial partnership has become a lasting friendship – one of insight, intelligence and creativity.

No one knows you better.

And who better to become your financial advisor?

Calculate the capabilities.

Your CPA is candid, and knows you well enough to be objective and honest when it comes to your books, your business and your family finances.

Now, your CPA can become your primary financial advisor – thanks to the **cpa+**[™] program offered by AFA Financial Group.

Learn about the changes that can change your future.

Your CPA is now in charge of a financial services department with a broad range of extensive experience – including a team of investment advisors, an insurance arm, and an estate planning group. All these professionals are just a phone call or e-mail away.

Working in unison with these other financial specialists, your CPA can help you as never before.

Take your **future** into account.

Maybe you want to sell a business, exit with enough cash, and retire on your portfolio's return. Maybe you need a 401(k) rollover, and better control over your investments. Maybe you're going through a life transition – a marriage or divorce, a new arrival in the family, the death of a spouse.

AFA gives your CPA financial planning capability, so you can get financial advice from your most trusted advisor for today and tomorrow. With our help, your CPA can implement responsive tax and financial planning strategies to help achieve your financial goals and objectives.





AFA has given your CPA
Wall Street capabilities.

Great resources just strengthened a great relationship.

If you could go to your CPA for investment and insurance advice and asset management, wouldn't you have greater peace of mind?

After all, who understands your finances as well?
And who respects your privacy as much?

Why should you have to explain your personal financial history again and again to brokers, Realtors®, insurers, and strangers?

Now, AFA has given your CPA Wall Street capability – the capability to help you plan your financial future, and to answer some of your biggest questions with *bona fide* solutions.

You have questions.

“When should I retire?”

“How much money will I need across the next 20 years?”

“Should I sell the business, or keep it in the family?”

“What kinds of investments make sense for me?”

“Should I buy real estate, or revise my portfolio?”

“Would it be wise to get long term care insurance?”

“What can I do to make my estate more liquid?”

Who can answer these questions better than your CPA?

Now your advisor can help you find answers.

AFA Financial Group puts your CPA in charge of an experienced team of investment advisors, estate planners, and insurance professionals. The goal of this team effort is to help you accumulate wealth, profit from your personal and business interests, and preserve your capital.

The service of Wall Street. The friendliness of Main Street.

Thanks to the AFA relationship, your accountant can provide the same set of services as a Wall Street brokerage firm, and with a personal touch that's absent online.

In addition to the innovative, creative tax strategies that may enhance your return, your CPA can now offer you growth strategies for your portfolio, retirement and succession planning for your life and business, and estate planning to help shield your loved ones from taxes.

Again, your CPA is always in charge. AFA works for your CPA, and provides services that we believe will enhance your professional relationship.

How can we sum this up?

Pair the trust and knowledge of a good accounting relationship with the power of comprehensive financial services. Ask your accountant to become your financial advisor – with the ready resources of AFA Financial Group.



AFA



AFA Financial Group has built its reputation on the strength of its exclusive CPA+ program and network of qualified CPAs. Ask your CPA or call us for the nearest affiliated office.

Securities offered through



Financial Group, LLC

Member NASD, SIPC

A Registered Broker/Dealer

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