



KEY REASONS WHY WE ARE IDEALLY SUITED TO MANAGE YOUR INVESTMENTS

*You can be confident in the fact that
as your CPA advisor:*

- We understand your complete financial picture.
- We are qualified to consider tax implications of your investments.
- We are disciplined in our approach. We avoid market timing strategies.
- Our investment advice is directed by our comprehensive financial planning with you.
- As CPAs we are bound by the highest ethical standards of objectivity and confidentiality.
- Our Registered Investment Advisory firm status holds us to fiduciary responsibilities which exceed those of traditional brokers.
- Our compensation for asset management is fee-only. We avoid conflicts of interest to buy or sell on your behalf.
- We comprise a team of investment advisors, collaborating with *CPAlliance*[™] to build a financial portfolio tailored to you.
- We embrace a lifetime relationship with you and your family.



RFM

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