YOUR FINANCIAL ADVOCATES

ORGANIZE. ANALYZE. PLAN

MOMENTUM FINANCIAL PARTNERS

YOUR FINANCIAL PLANNING TEAM

- CERTIFIED FINANCIAL FIDUCIARIES
- WEALTH PLANNING SPECIALISTS FOCUSED ON TRANSITIONAL EVENTS: RETIREMENT, SALE OF BUSINESS, REAL ESTATE, CHANGE OF MARITAL STATUS, CAREER/JOB CHANGE, INHERITANCE, AND UNTIMELY DEATH.

THE AMERIFLEX GROUP

INDEPENDENT SEC REGISTERED INVESTMENT ADVISORY

- $4+ BILLION ASSETS UNDER MANAGEMENT
- 65+ FINANCIAL PROFESSIONALS IN 14 STATES
- ADVISOR OWNED AND OPERATED
- COMPLIANCE AND REGULATORY OVERSIGHT

SagePoint FINANCIAL

BROKER / DEALER

- COMPLIANCE AND REGULATORY OVERSIGHT
- REGISTERED WITH FINRA AND SEC
- OVERSEES BROKERAGE ACCOUNTS
- MAKES A MARKET IN EXCHANGE LISTED SECURITIES

ASSETMARK

INVESTMENT SOLUTION PROVIDER

- UNIQUE INVESTMENT AND WEALTH MANAGEMENT SOLUTIONS
- SPECIALTY LENDING AND BANKING SOLUTIONS
- TRUST SOLUTIONS
- RETIREMENT PLANS FOR BUSINESSES - 401(K)

Pershing

ASSETMARK TRUST COMPANY

CUSTODIAN OF ASSETS

- TAX REPORTING AND ACCOUNT STATEMENTS
- HOLDS SECURITIES FOR SAFEKEEPING
- SECURITIES BACKED LINE OF CREDIT (ASSETMARK TRUST ONLY)
    - SIPC INSURED