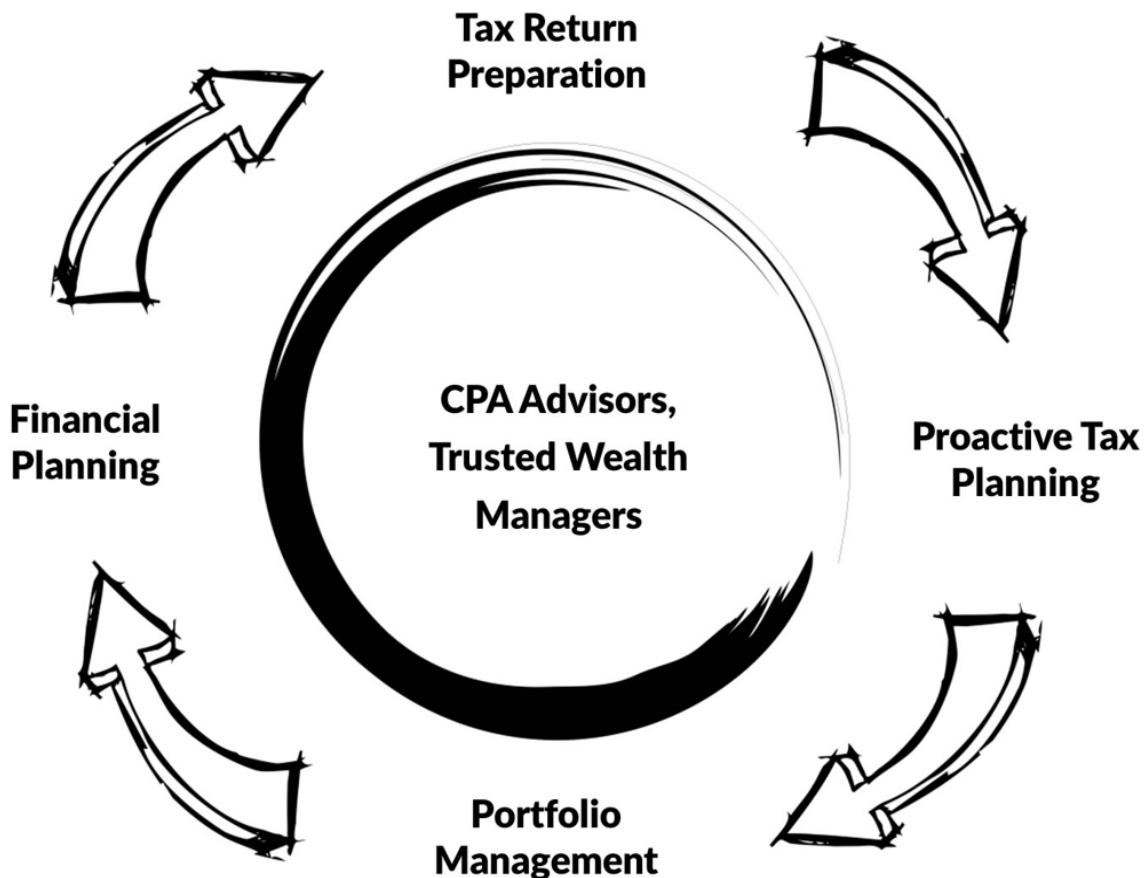




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WHO DO WE SERVE?



HIGH NET WORTH

High net worth clients seem to value three things more than anything else – (1) trustworthiness, (2) convenience, & (3) access to quality private investments. With our deep bench of skilled accounting professionals, we can coordinate our portfolio management services with family office services such as tax preparation, & quarterly household financial statement creation. For added diversification, our accredited investors have access to heavily screened private equity, real estate, and hedge funds traditionally reserved for private banking clients of large wire houses.



RETIREMENT TRANSITION

We guide clients through the various challenges of shifting from the accumulation phase of life to the distribution phase... namely the significant impact it [should] have on the client's financial strategies in the areas of investing, tax preparation, social security filing, risk management [aka insurance], & mortgage financing.



BUSINESS OWNERS

If you own a business, your personal finances & business finances often overlap. You have to juggle countless service providers: tax accountants, bookkeepers, insurance brokers, retirement plan administrators, investment advisors, etc. The list goes on. What if you had a firm that could coordinate all of these services? Tax planning & preparation for your business & household, investment management for personal assets & your retirement plan, & management of outside bookkeepers & insurance providers. How much time would you save? How much better would your odds be for long-term financial success & sound management of your business? FFG's team of CPAs, Certified Financial Planners™, & Chartered Financial Analysts™ provide unparalleled value for business owners through our rich/diverse experience & service offering.



WIDOWED, DIVORCED, OR INHERITING

These difficult life events can leave a man or woman in a new position of financial responsibility after relying on a loved one for many years to handle the finances. We help these clients get comfortable in their new role. These individuals are common targets for financial abuse. Having us as an advocate to coordinate tax and investment services together under one firm umbrella can reduce stress, save time, and mitigate the risk of mistakes caused by miscommunication juggling too many service providers.