



## Boutique Team of Retirement Advisors Is Single Source for Tax, Legal and Financial Services

*Liberty Group, LLC*

**W**hen elder law attorney and financial adviser David Hollander, Esq. founded Liberty Group, LLC in 1999, he envisioned assembling a Retirement Dream Team – a cadre of highly qualified investment professionals and distinguished legal minds under one roof.

Today, his independent financial services firm is home to an impressive group of account executives with more than 100 years of combined experience: Certified Public Accountants, Chartered Financial Consultants (ChFC®), Certified Life

"We work with our clients' trusted outside advisors. But because of our tremendous in-house resources, we are also able to convene specialized teams to fill gaps and handle unique needs. When all these professionals are on the same page, the result is a well-coordinated financial game plan with synergy that optimizes the chances for success and minimizing risks," says Hollander, who is perhaps one of California's best recognized thought leaders in the area of protecting assets.

The breadth and caliber of services available through Liberty Group give clients the ultimate flexibility when choosing how they will work with a financial advisor. Many investors are looking for fee-based services to manage their portfolios. Others prefer to pay for investment advice only when they need it, so they choose to work with a broker on a fully transparent commission basis.

Regardless of the pricing structure, each advisor is committed to offering unbiased advice and keeping clients satisfied. "We don't work for any single company," says Hollander, who fiercely protects his family-owned company's independence. "So we have the luxury of selecting the very best products or services that best match each client's needs. Not thousands of options, but tens of thousands. Then, by coordinating them, we can provide even better value."



Underwriters (CLU®), Certified Financial Planners (CFP®), licensed life agents, Investment Advisory Representatives and FINRA Registered Representatives. Managing more than \$500 million in assets, Liberty Group is a single source for pre-retirees and retirees seeking guidance about investing, retirement planning, estate planning, tax strategies, insurance and catastrophic care.



**David Hollander**  
**Champions Investors'**  
**Interests**

Affectionately dubbed "The Sandman" by his fans because they say his advice helps them sleep at night, David Hollander is the host of AM680-KNBR's only legal/financial show, "Protect Your Assets."

Hollander is also a formidable presence among industry leaders, policymakers, regulators and consumer groups. He has authored important insurance consumer protection legislation, including AB 412, and led the legal battle to stop the state from recovering against retirement accounts (CASEP vs. California Department of Health Services). He is also frequently invited to speak at industry conferences on the topics of elder rights and long-term care reform.



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