




WE ARE

MyRemoteFA, powered by Innovative Financial Group, our goal is to help you best manage your finances through a personalized strategy that is tailored to your needs, and is customized around your schedule. We are a team of financial advisors available to help you with understanding your finances and developing a customized strategy to align with your needs, goals, concerns and expectations. Our network of trusted advisors use the latest technology to provide a modern approach to managing your finances. We recognize the value of your time, and we make it easy for you to connect with us remotely through phone, email, and even screensharing. We offer all of the services of a traditional Financial Advisor relationship, but with the added convenience to meet on your terms.



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Securities and investment advisory services offered through Royal Alliance Associates, Inc. member FINRA/SIPC. Royal Alliance Associates, Inc. is separately owned and other entities and/or marketing names, products or services referenced here are independent of Royal Alliance Associates, Inc.



WE HELP YOU PROTECT,
GROW AND ENJOY
YOUR WEALTH





YOUR GOALS OUR SOLUTIONS

We will help you come up with a strategy that fits your lifestyle, while protecting you and your loved ones along the way through insurance.

How we work WITH YOU

When working with MyRemoteFA, we will utilize the latest in technology which will be customized to your comfort level. This includes the use of screen-sharing technology and electronic communications via email, as well as traditional methods. However you chose to engage with MyRemoteFA, ***we will always strive to accommodate your needs to ensure you have a positive experience.***

If the time comes that you need a face-to-face meeting, we have the network footprint to meet your needs.



Our Network

we have a network of **200+** advisors.



Our Reach

Our networks are located across **30+** states.



Our Convenience

Meet with our advisors at their office or in the comfort of your own home.

OUR TEAM



Sean Bove, CFP®
VP, Retail Client Division,
Investments



Alex Petrovich
VP, Retail Client Division



Kiley Hard
Director, Client Relations



**Brian Heapps, CLU,
ChFC**
President, CEO



Amy J. Heapps, MSM
VP, Marketing & Recruiting



Melissa Wiggins
Director, Office & Event
Coordinator, Client Services



Lori Bohnenstiehl
Director, New Business
Concierge

Case #:16855775

Submission Date:05/22/2019

Response Date:05/22/2019 5:05:00 PM

This review expires two years from the response date above.

(NOTE: Stationery reviews do not expire after two years as they are excluded from the biennial review requirement. See firm policy for details.)

Advertising Compliance Department

Communications Review

Rep: BRIAN B HEAPPS (F94)

OSJ: BRIAN B HEAPPS (F94)

Submission Information:

Title: MyRemoteFA Brochure

Distribution Method: Brochure/Hand-out

Conditional Approval

Note : IMPORTANT - Per the Sales Practices Manual, all communications to the public must contain the advisor's registered branch office address and phone number, as well as broker-dealer identification/disclosure. Therefore, when distributing this material as a hard copy, your firm-approved business card must be attached or on corporate approved letterhead. If distributing via electronically, you must use your firm approved email signature and by other electronic distribution you must use your firm approved website and/or social media pages. Thank you--Michael Grossman

(Resubmission Not Required)

This material is approved for distribution in all states in which you are registered to conduct business, provided the conditions noted above are met prior to use.

Please be advised of the following:

1. This approval may be revoked at any time through written notification from the firm.

2. Keep a copy of this response in your advertising file with a copy of the submission.
3. We have reviewed this material with the understanding the broker-dealer disclosure and registered branch address and phone number is included with the material. Additional disclosures are required if you are located in a bank or credit union. See firm policy for additional information.
4. Unless the material submitted is a stationery item, the Advertising Compliance Department has not reviewed the registered branch location(s), telephone number or email address/website URLs present.
5. We offer no comment concerning outside business activities discussed or promoted. It is the responsibility of the advisor and their FLS to ensure that all information contained within the approved sales material is in compliance with firm policies and procedures.
6. If this material has been approved for all registered representatives within a branch, a copy of this approval and the material will need to be maintained in each registered representative's advertising file along with the date of first use of the material.
 1. Ensure that persons using this material are registered to advertise the services mentioned.
 2. Have disclosed DBA names to the firm or have received approvals for marketing names advertised.
 3. Ensure the broker-dealer disclosure is updated to accurately reflect the affiliations of the advisor using the material.
7. This approval is only for the material submitted and not for other communications referenced within, such as a website or seminar presentation, unless specifically noted. Other communications must be submitted as separate items to Advertising Compliance.
8. This material was reviewed for adherence to regulatory and firm standards governing communications with the public. Advertising Compliance offers no comment on legal issues and reviews do not encompass suitability and know your customer requirements.
9. It is the responsibility of each advisor distributing approved sales material to ensure distribution is suitable for its intended audience.
10. It is the submitting representative's responsibility to ensure legal authority for usage of all material submitted.
11. It is the responsibility of each advisor to ensure that any designation displayed on the material is held out in accordance with any requirements of the issuing organization, that any guidelines established by the issuing organization are being followed, and that continuing education and

membership are current and up-to-date.

Reviewer :
Michael Grossman
michael.grossman@advisorgroup.com