

Serving The Special Needs Community



Vantage has a strong and meaningful partnership with the special needs community, and has gratefully served this community for more than 30 years.

VANTAGE'S SERVICES PROVIDED TO THE SPECIAL NEEDS COMMUNITY INCLUDE:

Third Party Administrator and Investment Advisor for one of the largest State special needs pooled trusts in the United States.

Coordination of Probate Services

- Guardianship Matters
- Special Needs Trusts
- Pooled Trusts
- Third Party Discretionary Trusts

Comprehensive Asset Management

- Client needs analysis
- Life Care Plan Coordination
- Asset allocation and risk management
- Wealth accumulation and preservation
- Strict adherence to Prudent Investor rules and legal investment guidelines
- Periodic accounting and inventory preparation

Vantage Support Services

- Asset Management
- Structured Settlement Design and Placement
- Estate Planning

An Independent, Single-Source Financial Services Firm since 1969

Securities are offered by a Registered Representative through Cetera Advisor Networks LLC, Member FINRA/SIPC. Vantage Financial Group and/or Vantage Settlement Advisory Group are not a subsidiary or affiliate of Cetera Networks. 888.401.2980 or 216.642.7878

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