



## Do You Know Someone Who Would Benefit From a Second Opinion on Their Finances?

### AFG Private Client Group Stands Ready to Help.

The last several years have left many people with deep concerns when they look toward their future. Many investors have had to adjust their expectations about the life they will live in the years ahead. Because of this, some are considering switching their financial advisors.

Does this sound like someone you care about? If so, they may be asking themselves some of these complex questions:

- Are my goals and vision for the future in alignment with my current financial strategy and investments?
- Is there one resource that will review my entire financial picture, including insurance, estate planning, tax mitigation, charitable giving and investing, to make sure I am making informed choices?
- Are my current advisors in these key areas the right ones? Do they deeply understand me and my family and our unique situation? Have they structured the right plan and are they working together as a team to execute it?

If there are people you care about who are facing these issues, they could benefit from receiving a second opinion on their financial situation. In the Second Opinion Service, we will take them through the first two steps of our consultative process; the discovery meeting and investment plan meeting. This complimentary service is an excellent way for them to begin to close the gap between where they are now and where they want to be in the future.

In our initial meeting, we will examine their goals, dreams and financial situation and compare them to their current financial strategy. If appropriate, we will recommend changes to improve the way they manage their wealth and their overall financial situation to help them make informed decisions on achieving what is important to them.

If someone you care about would benefit from a second opinion, please call 520.886.8686 or send an email to [todd@myafg.net](mailto:todd@myafg.net).

You can make a substantial difference in the financial future of someone you care about with a single email or phone call.

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