



Welcome to Potomac Advisory  
Group. Our goal is to help you live the  
one life you have the best you can.

## Welcome

Dear Client,

On behalf of Potomac Advisory Group, welcome to our network of valued clients. We are delighted that you have chosen us to help you pursue the financial future you envision. Here is some information outlining the services we offer and what you can expect throughout this journey.

Potomac Advisory Group is a full-service accounting, tax and financial services provider committed to helping individuals, families and businesses succeed financially. We offer creative, customized solutions. See our Products & Services menu for more information.

In addition, we have access to an abundance of resources through one of the top broker/dealers in the industry<sup>1</sup>, Avantax Investment Services<sup>SM</sup>, but the independence to control our culture and values. And what we value most is *you*. Our client-centric focus ensures that our advice supports your vision and our service exceeds your expectations. Along with fair and honest counsel, we believe in the confidentiality of your personal information and the transparency of our fees and services.

We delve deeper into the financial process, we ask for your cooperation in maintaining our trusting relationship by us with disclosure of your financial situation, as applicable, and informing us promptly as changes arise. This will aid us in our quest to help you pursue your goals successfully. If you know anyone who could benefit from any of our services, please feel free to pass along our information.

We look forward to working with you. If you have any questions about our company or the services we offer, please contact us.

<sup>1</sup>Independent Broker-Dealers 2013, *Financial Advisor Magazine*, 2013

Securities offered through Avantax Investment Services<sup>SM</sup>, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisor Services<sup>SM</sup>. 6333 North state highway” is an old address, please update to 3200 Olympus Blvd, Suite 100, Dallas, TX 75019. 972-870-6000