



WHAT ELSE CAN WE NOW OFFER YOU?

Access to Integrated Financial Planning and Risk Assessment

We will leverage cutting-edge fintech solutions and integrated tools for building financial plans and conducting on-going risk assessment and portfolio stress testing.

Fiduciary Choice

As a fiduciary, we have always placed your interests first. Now we are "multi-custodial" and able to offer you investment solutions and services from a broad range of financial companies. This includes access to innovative banking services such as collateralized loans and lines of credit. Simply put, being multi-custodial lets us choose the products and services that are right for you and your situation.

Gaining the Insight of Our In-house Chief Investment Officer

RFG's in-house CIO is a go-to resource and provides access to an institutional caliber investment team. What's more, our in-house CIO regularly hosts client events to discuss topics like the economy, women and finance, and balancing investing as an entrepreneur.

Putting You First

More than anything, this new partnership is about you. We want to do more than just manage your money. We want to exceed your expectations with truly personalized service and an exceptional experience.

Welcome to our next chapter together!

Investment advice offered through RFG Advisory, a Registered Investment Advisor.

Being Independent to Serve You Better

Every day, more and more advisors choose independence. But why? It's simple: being independent gives us the ability to better serve clients. We want to deliver an exceptional experience that exceeds your expectations.

PARTNERING WITH RFG

Our partnership with RFG allows us to be the CEO of our practice and not the COO. We free up valuable time by leveraging their robust platform to handle much of the necessary behind-the-scenes work. That means more time doing what we love—working with you!

It's also about the future. The wealth management industry is changing. Clients demand more, and we want to deliver.

IT STARTS WITH TECHNOLOGY. MEET FETCH. YOUR FINANCIAL LIFE HUB.

You'll have anytime access to a cutting-edge client portal capable of aggregating all your financial information in one easy-to-view and manage place. It's called FETCH, and it's available exclusively to RFG-affiliated advisors and their clients.



It's Called Life Hub for a Reason

This is where you will access all of your account information, important documents, financial plan, market commentary, and news.

Enjoy Comprehensive Account Management

The in-depth information provided by FETCH keeps you in real-time touch with your money. You'll enjoy access to your financial accounts. You'll also have the option to link your outside accounts—your 401(k) and bank account(s) for example—to create a real-time net worth statement.

View Dynamic Financial Plan

Forget about outdated binders on shelves. In FETCH you can view your comprehensive financial plan updated to reflect your current account values.

Get Organized

At last, you'll have your important documents in one place. FETCH Documents allows you to upload and store your important paperwork—tax returns, wills & trusts, healthcare directive, insurance policies—securely in your portal. This makes life easier for you, and your kids and heirs will thank you, too.

Streamline Communications

FETCH connects your advisor like never before. You'll schedule a meeting and have a video chat with your advisor all from inside your portal. Whenever you want, get your questions answered or have an impromptu review on the fly.

Customize Your Content

You decide what news and information you see and how you see it. You'll work with your advisor to design an account statement and receive customized reports. Just imagine having your financial information designed by you to provide maximum clarity and insight.

Get Secure Access from Anywhere

Security is important. You'll have secure access to your information via computer or on a smartphone or laptop using the mobile app. Two-factor authentication and thumbprint access provide the highest level of security while offering easy access.

