

Team Profile



We Think Outside the Box

Avon, Connecticut



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Balance Sheet



Cash Flow Report



Realized Gains/Losses



Family Index
Calculation



Client Document
Storage



Collaboration with
Trusted Professionals

Robust Financial Planning Analysis

Detailed Analysis and Recommendations
The AmeriFlex Group™ Team will provide you with a comprehensive Transitional Wealth Planning suite:

Additional Resources and Timely Ideas

- ✓ Securities Backed Line of Credit
- ✓ Brokered CDs
- ✓ Monthly Email Newsletter
- ✓ Risk Management Review
- ✓ Coordinated Trust Services
- ✓ What-Ifs
- ✓ Quarterly Reports
- ✓ Annual Review with Client and Planner

