

PLAN YOUR FUTURE.
LIVE YOUR

Life.

PERSONAL & BUSINESS FINANCIAL PLANNING





Dream
BIG DREAMS
but never forget
that realistic
short-term
GOALS
are the key
to your
Success.





At ARGI Financial Group, we provide comprehensive planning designed to help grow, protect, and conserve your wealth, guiding you one step closer to achieving your life goals.

Your advisor will coordinate your relationship with an entire team of ARGI in-house specialists offering Financial Planning, Business Services & Consulting, Qualified Plan Services, Tax Planning and Investment Management.

ARGI's team of specialists strives to improve the lives of goal-focused professionals, businesses and families through proactive, objective and client-centered advice, financial planning and investment management.

OUR CORE VALUES

PERSONAL SERVICE

If the Client Wins, We All Win

TEAMWORK

Everyone for Someone Else!

COMMITMENT

Committed to Everyone's Success

INTEGRITY

Belief in What We Do

INNOVATION

Forward Focused Thinking

EDUCATION

Knowledge...the Roots of our Foundation

our **process**... your **growth**.



At ARGI, we concentrate first on your goals. We discuss with you where you want to go and what type of lifestyle you want to live while getting there. We then analyze your present circumstances, resources, and objectives, and develop a written financial plan. Once the plan is in place, we recommend strategies to help accomplish these goals and steps to keep you focused on the path to realizing your dreams, even if your dreams change over time.

The ARGI team will schedule regular meetings with you and assist in the management of your financial affairs. We will regularly evaluate your plan, making necessary adjustments and revisions so that it always remains in direct alignment with each of your goals.

Always Available

We are here to help you reach your goals and offer online client service tools to help you stay connected. You have 24-hour access to monitor the progress of your financial plan, stay informed on current market information and utilize helpful financial tools at www.argi.net.

our services

Financial Planning

ARGI offers a truly unique, comprehensive approach that goes beyond financial needs and incorporates a personal goals assessment. By taking into consideration the person and / or family behind the means, we hope to help you make the absolute best of your journey to a rewarding retirement, as well as the years that await you beyond.

- Retirement Analysis
- Risk Management
- Tax Strategies
- Estate Planning
- Wealth Management
- Corporate Executive Planning
- Holistic Life Planning
- Education Planning

Business Services & Consulting

Our Business Services offer business owners financial freedom through strategies for solid financial protection and business growth, and efficiency in maximizing your employee benefit plans.

- Business Wealth Planning Solutions (Exit / Succession Planning)
- Tax Planning
- Business Analytics / Business Potential Maximization

Qualified Plan Services

Whether you are a plan sponsor, a participant, or someone interested in beginning a new qualified retirement plan, ARGI can provide you with customized, cost-efficient and high quality services including:

- Retirement Plan Design / Enhancement
- Fiduciary Risk Management
- Investment Consulting
- Participant Education & Advice

Tax Planning

Our Tax & Business Services Team offers comprehensive services that work in unison with your personal financial plan, ranging from tax compliance to advanced tax planning strategies, all focused on helping you achieve your goals.

- Return Preparation
- Estate Considerations
- Tax and Risk Efficiency
- Projections / Deduction Optimization

Investment Management

At ARGI, we are able to implement investment strategies in a variety of ways. We offer a vast assortment of in-house ARGI Managed Portfolios as well as options from private institutional money managers and other mutual fund companies.

- Objective, Independent Advice
- Internal Investment Committee
- State of the Art Technology

what makes ARGI *different?*

At ARGI, you are the heart of everything we do. Whether it's planning for a comfortable retirement, higher education, or a vacation home on the beach, you may have a clear vision for the future; however, arriving at those dreams does not just happen. It often involves a plan developed with knowledge and expertise, which is what our team at ARGI can provide. We help address both your financial and emotional needs through the integration of financial planning and holistic life planning tools to help you define and attain your ideal retirement. We spend time training, coaching and developing our staff to ensure your needs as a client are met, and truly believe the ARGI experience will speak for itself.

Rather than an "every man for himself" approach, we realized that building advisory teams produced a higher quality end product and enhanced the entire client experience. Our team approach offers more knowledgeable advice and personalized service so you have more than just a financial planner – you have an entire team of specialists dedicated to providing you World Class client service. You will be introduced to your advisor's team of professionals and can ask for them by name when you call our office.

It starts with your vision. It happens with a plan. Call an ARGI advisor today to see why our approach is different than other financial planning firms, or go online and take our discovery survey at www.argi.net/discoverysurvey to get started.



GO CONFIDENTLY
in the **direction**
of your
dreams.
Live the life you have
IMAGINED.



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Advisory services offered through ARGI Investment Services, LLC, a Registered Investment Advisor