



PERSONALIZED PLANNING FOR A SECURE FUTURE

CRR, LLP has partnered with Axial Financial Group—an independent financial services firm that provides wealth management services.

BENEFITS OF A COORDINATED APPROACH:

- The combination of your CPA firm and wealth management firm working together provides you with a coordinated financial plan, as well as seamless and unified communication.
- Complimentary, no-cost obligation review of your financial situation, including a full wealth management plan presentation, asset allocation review, and proposed repositioning.
- Oversight and coordination of the accumulation, protection, and distribution of your financial assets.
- Direct access to Axial's team of financial advisors, retirement plan experts, and insurance/employee benefits specialists.
- A dedicated "Quarterback" from Axial who will ensure that all members of your financial team (client, accountant, attorneys, asset manager, insurance professional, lending specialists, bankers) are working together toward a common goal.



"Having Kristen working within our office translates to real-time communication regarding our client's tax and accounting needs as well as their financial planning objectives. This alliance results in a tremendous value for our clients"

David J. Richards
Managing Partner, CRR, LLP



"Navigating today's financial landscape has become increasingly complex and challenging. This integrated approach ensures that the members of your financial team are working efficiently towards a common goal: your financial success"

Kristen Smith*
CFP®, AIF®, Axial Financial Group LLC

For more information, contact Kristen Smith at 781.273.1400 or ksmith@axialfg.com.

*Securities and advisory services offered through Commonwealth Financial Network®, member FINRA/SIPC, a Registered Investment Adviser. CRR, LLP (also represented as CRR, CRR CPA), Axial Financial Group, and Commonwealth Financial Network are separate and unrelated entities. Axial Financial Group is located at 5 Burlington Woods, Suite 102, Burlington, MA 01803. PH (781)- 273-1400.