



THE COLLABORATE SERVICES PLATFORM

For Public & Private Companies,
Business Owners & Corporate Executives

WHO WE ARE

American Financial Network (AFN), an Independent Financial Solutions Firm, has over 25 years of leadership in the financial services industry. The advisors at AFN offer custom and comprehensive financial planning, wealth management, risk management and non-qualified benefits enrollment support. An experienced professional resource for both individual and corporate clients; the advisors at AFN deliver unparalleled service and support, along with a caring dedicated team of accomplished financial service providers. Our advisors provide unbiased financial planning and investment advice as financial representatives of Securities America Advisors, Inc.

WHO WE SERVE

Individual Clients, in addition to Private and Public Middle Market Companies in the United States.

Ideal Individual Client Profile: We specialize in working with Business Owners and C-Level Executives.

Ideal Corporate Client Profile: Profitable Middle Market Companies with Revenues from \$5M to \$500M+.

WHAT WE DO

I. Financial Planning

- Goal-driven Comprehensive Custom Financial Plans (Cash Flow Analysis; Allocation Design; Tax, Retirement, Estate & Education Planning; Risk Management)
- Financial Planning can be offered as a company benefit through our **Executive Financial Planning Program**, which also offers 3rd party independent advisors for Tax Preparation, Legal, Real Estate, Banking, Executive Coaching and more

II. Asset Management

- Specialization in Asset Allocation and Portfolio Design
- Investment Implementation and Management
- Separately Managed Accounts
- Structured Products: PPVUL, among others
- Direct Participation Programs (Real Estate, Oil & Gas, Managed Futures)

III. Risk Management

- Individual Life and Disability Insurance, Long-Term Care, Estate Insurances, (Term, Permanent, Premium Finance)
- Corporate Ins.- COLI, Group Life-Section 79, Premium Finance, PPVUL, Keyman, Buy/Sell, Stock Repurchase
- Self Insurance Strategies and Programs, including Captive Insurance Companies

IV. Corporate Compensation & Benefit Services

- Benefit Review and Consulting Services including Plan Design and Implementation
- Executive Compensation & Benefits
- Entity Planning
- Business Continuation Planning

V. Financial Solutions Alliance (FSA)

- The FSA is a network of best-in-class professional service providers who come together to cross-serve corporate and individual clients nationally, regionally and locally.

Securities America, Inc. - Over 1900 Representatives Nationwide

As a Securities America Advisor Representative, Brett Ellen, CFP® must meet the highest standards in an already tightly regulated industry and has extensive corporate benefit planning experience, in addition to advanced individual planning experience that meets the specific needs of today's corporate executives and high net worth clients. Brett is a Registered Representative of and offers securities through Securities America, Inc., a full service broker/dealer serving independent investment professionals nationwide. (CA Insurance License #0655679)

Securities America and its representatives do not provide tax or legal advice. Please consult the appropriate professional regarding your specific situation.