American Financial Network

AN INDEPENDENT FINANCIAL SOLUTIONS FIRM

Serving Both Individual & Corporate Clients

- Financial Planning
- Wealth Management
- Corporate Benefit Planning
- Risk Management

MISSION STATEMENT

American Financial Network (AFN), an Independent Financial Solutions Firm, offers custom and comprehensive Financial Planning, Wealth Management and Corporate Benefit Planning Services. The advisors at AFN deliver unparalleled service & support along with a dedicated team of accomplished financial service professionals. An experienced professional resource for both individual and corporate clients; the advisors at AFN provide unbiased financial planning and investment advice as financial representatives of Securities America Advisors, Inc.

COMPANY PROFILE

- Over 25 Years of Leadership in the Financial Services Industry
- Independent Investment Advice
- Custom Financial Plans
- High-Net-Worth Executive Level Client Base
- Extensive List of Corporate Clients
- Hands-On Proactive Management by Company Founder, Brett S. Ellen, CFP® recognized as a Accomplished Financial Professional
- In-House Support Team of Experienced, Licensed, Qualified Professionals
- Financial Solutions Alliance
  A Network of "Best-in-Class" Financial Service Providers Cross-Serving both Individual & Corporate Clients locally, regionally and nationally
- Strong Reputation & Involvement in the Communities We Serve

A VAST MENU OF FINANCIAL PRODUCTS & SERVICES

FINANCIAL PLANNING

Our Goals Driven Custom Financial Planning Process includes a detailed Cash Flow Analysis, Evaluation of Existing Holdings, an Investment Policy Statement and Custom Allocation Design.

INVESTMENTS*

- Stocks & Bonds
- Mutual Funds & Money Markets
- REITS, Partnerships
- Separately Managed Accounts
- Alternative Investments

TAX STRATEGIES

- Seeks to Maximize Tax Deductions
- Tax Advantaged Investments*

EDUCATION PLANNING

- 529 Plans (College Savings)
- Other Strategies

ESTATE PLANNING

- Proper Management of Family Assets
- Wills, Living Trusts, Foundations
- Seeks to Minimize Probate Expenses & Taxes

RETIREMENT PLANNING*

- Identifying Needs in Future Dollars
- Setting Up IRAs and Other Plans
- Rollovers & Lump Sum Distributions
- Roth Conversions

WEALTH MANAGEMENT

- On-going Monitoring of Plan(s)
- Quarterly Reporting & Benchmarks Tracking
- Rebalancing Portfolio

CORPORATE & EXECUTIVE BENEFITS

- Qualified 401(k)s & Profit Sharing Plans
- Defined Benefit Plans
- ESOPs
- Section 125 (Flexible Spending Accounts)
- Custom Designed Group Life
- Deferred Compensation, SERPs and Bonus Plans
- Business Continuation Planning & Exit Strategies

RISK MANAGEMENT

- Life, Health & Disability Insurance
- Long-Term Care
- Captives & Self Insurance
- Key Man Insurance
- Buy/Sell Agreements

AMERICAN FINANCIAL NETWORK

www.afn-net.com

1-800-585-3326

Securities America and its representatives do not provide tax or legal advice. Investors must consult a tax or legal advisor for advice and information regarding their particular situation.

**Securities offered through Securities America, Inc., a Registered Broker/Dealer, Member FINRA/SIPC and Financial Planning & Advisory services offered through Securities America Advisors, Inc., an SEC Registered Investment Advisor. American Financial Network and the Securities America companies are not affiliated.*

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