AMERICAN FINANCIAL NETWORK

AN INDEPENDENT FINANCIAL SOLUTIONS FIRM

STRATEGIC FINANCIAL SOLUTIONS

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

American Financial Network serves Individual Clients, in addition to Private or Public Middle Market companies throughout the United States.

Ideal Individual Client Profile: *Our team of professionals service individual clients at every level with no income or investment minimums. We specialize working with Business Owners and C-Level Executives.*

Ideal Corporate Client Profile: *We specialize in Profitable Middle-Market Companies with revenues from $10M to $500M+.*

WHAT WE DO

I. Financial Planning
- *Goals driven comprehensive custom Financial Plans (cash flow analysis, tax, retirement, education, riskmanagement, estate, allocation design)*
- *Financial Planning can be offered as a company benefit through our Executive Financial Planning Program which also of offers 3rd party independent advisors for tax preparation, legal, real estate, bankers and executive coaches among others*

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 insurances- COLI, Group Life-Section 79, Premium Finance, PPVUL, Keyman, Buy/Sell, Stock Repurchase*
- *Self Insurance Strategies and Programs including Captive Insurance Companies*

IV. Non-Qualified Benefits Enrollment Support
- *Communicate Benefits of Plan Contributions*
- *Generate Ideas for Holistic Financial Planning*
- *Enhancing Individualized & Personalized Service*
- *Provide Investment Recommendations*

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.*

As a Securities America Advisor Representative, Brett Ellen, CFP® must meet the utmost 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)

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