PLATINUM

FINANCIAL GROUP

YOUR PARTNERS IN BUILDING WEALTH AND SECURITY

Who we are

YOUR PARTNERS IN FINANCE, INSURANCE & INVESTMENT MANAGEMENT

As a member firm of the John Hancock Financial Network, Platinum Financial Group is dedicated to helping individuals, families and businesses build their financial futures through the use of sound wealth management strategies, products and services. Our dedicated associates – many of them parents, and providers themselves – understand how important it is for our clients to successfully provide for those who rely on them. With over 38 years of combined experience, we give financial guidance that is tailored to each of our client's unique needs. Our primary objective is to deliver unparalleled service and value, while providing the necessary tools and resources needed to help you achieve financial independence. Through our locations in Wesley Chapel and Tampa, we will serve as your partners in building wealth and security.

What we do

OFFER A FULL RANGE OF PRODUCTS AND SERVICES DESIGNED TO HELP YOU REALIZE YOUR FINANCIAL GOALS.

Together with Signator Investors, Inc., a Registered Investment Advisor, John Hancock, and a host of other insurance and investment companies, we offer a wide range of products and services to help create your wealth management and protection strategy. Our financial professionals will take an all-encompassing approach, often working closely with our network of attorneys, CPA's, TPA's and other professionals, as needed, to tailor a strategy that suits your needs, concerns and current stage of life. As your partners in building wealth and security, we will help you find appropriate solutions to issues such as:

» Retirement Planning & Solutions
» Wealth Management
» Investment Advisory Services
» College Funding
» Small Business Planning
» Estate Planning & Conservation
» Insurance Protection

Network of Services

Financial Solutions

HELPING INDIVIDUALS AND BUSINESSES BUILD THEIR FINANCIAL FUTURES THROUGH THE USE OF SOUND WEALTH MANAGEMENT STRATEGIES, PRODUCTS AND SERVICES.

RETIREMENT PLANNING & SOLUTIONS

- Individual Retirement Accounts (IRA's)
  - Traditional & Roth
- Income Maximization Strategies
- Asset & Income Protection
- Cash Flow Management

WEALTH MANAGEMENT

- Brokerage Accounts
- Annuities (Fixed, Variable & Immediate)
- Mutual Funds
- Tax Advantaged Investments
- Corporate Investment Accounts

INVESTMENT ADVISORY SERVICES

- Fee based accounts
  - Separate Accounts
  - Actively Managed Accounts
  - Mutual Fund Wrap Accounts

COLLEGE FUNDING

- 529 plans
- Educational Savings Accounts

SMALL BUSINESS PLANNING

- Defined Contribution Benefit Plans
  - Pension Plans
- Deferred Compensation Plans
  - 401(k)'s, SEP's, Simple IRA's
  - 403(b)'s, Profit Sharing Plans, Individual K Plans
- Executive Compensation Strategies
- Business Succession Planning
- Key Person Insurance
- Buy Sell Agreement Funding

ESTATE PLANNING & CONSERVATION

- Estate Needs Analysis
- Charitable Giving Strategies & Funds
- Survivorship Life Insurance
- Funding Strategies for Trusts
- Controlled Beneficiary Payouts

INSURANCE PROTECTION

- Life Insurance (Term & Permanent)
- Long Term Care Insurance
- Disability Income Insurance

Building a Relationship of Trust

OUR THREE STEP PROCESS CUSTOMIZES YOUR FINANCIAL AND WEALTH MANAGEMENT STRATEGY.

- **STEP 1: CONSULTATION AND ANALYSIS**

DISCOVERY OF YOUR INTENTIONS

The first step in establishing a relationship of trust is getting to know you. We will help you clarify what you want, why you want it, and prioritize your intentions and goals. Our focus is on understanding and evaluating your key challenges, opportunities, resources and experiences.

- **STEP 2: SOLUTIONS**

DESIGNING AND IMPLEMENTING PERSONALIZED STRATEGIES

Based on our initial meeting, we will conduct a thorough review of your financial situation, consulting professionals in the areas of law, and accounting as needed to help design a comprehensive, personalized financial strategy. We will tailor individual solutions, aligned with your intentions, to address the challenges that are most important to the success of your financial future.

- **STEP 3: MONITOR AND REVIEW**

DELIVERING VALUE AND PEACE OF MIND

Our relationship doesn't end with the implementation of your financial strategy. We meet with you on a regular basis to monitor and evaluate your ongoing needs and goals, recommending relevant adjustments as your circumstances or intentions may evolve or change. We at Platinum Financial Group pride ourselves on delivering value, and look forward to strengthening our relationship with you.

PLATINUM
FINANCIAL GROUP

PASSION • KNOWLEDGE • SOLUTIONS

What makes Platinum Financial Group Different?

WHERE DO WE BEGIN?

Maybe it's our personal approach to building, maintaining and protecting your wealth. Maybe it's our unique range of products and services. Or maybe it's our relationships with some of the industry's most respected institutions. Ultimately, it's all of these — backed by our commitment to build and maintain our relationship with you, our valued client. For more on how we can help you achieve your financial goals, please contact us today.

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