



CG Financial Services

TALK WITH AN ADVISOR

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# ADAPTIVE FINANCIAL PLANNING FOR INDIVIDUALS AND BUSINESSES

Our life planning process goes beyond traditional financial planning to organize your financial life and build an adaptive plan to help achieve your changing goals.

[LEARN MORE](#)

**\$3.1** Billion

Assets Under  
Management

22

Years of  
Serving Clients

74

Fiduciary  
Advisors

# GUIDING YOU THROUGH LIFE'S CHANGES

Gain peace of mind working with a trusted and experienced firm to organize, design, and implement an adaptive financial plan that meets your unique and everchanging financial goals.

## FOR INDIVIDUALS

**INVEST** FOR THE FUTURE



**PLAN** FOR RETIREMENT &



# BEYOND



## FOR BUSINESS OWNERS

**GROW & PROTECT** YOUR  
BUSINESS



**ATTRACT & RETAIN**  
EMPLOYEES





## WHY CHOOSE CG FINANCIAL

# EXPERT, INDEPENDENT & OBJECTIVE

We offer our combined expertise, credentials, and intelligence to provide you with the advice you value and expect.



## FIDUCIARIES

Serving your best interest.



## ACCREDITED

Many financial advisors hold designations, such as CFP<sup>®</sup>, CFA, and AIF<sup>®</sup>.



## INDEPENDENT

Not limited to any specific investment or insurance company.

TALK WITH AN ADVISOR

# INSIGHTS





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# PERSONAL SERVICES

Your journey is important to us. We strive to understand your story so you can live the best life possible with the resources you have.

A guide to maximizing your return on life:

- Understand your past, present, and future experiences and perspectives on money
- Align your financial means to efficiently grow investments, reduce taxes and protect wealth with an adaptive and agile plan
- Have real conversation without the financial jargon
- Navigate through life's transitions with advisors who understand your values and the purpose behind your life plan

RETIREMENT AND LIFESTYLE PLANNING





## MINIMIZING TAX IMPACT



## ENSURING YOUR LEGACY





PROTECTING  
YOUR FAMILY



PROTECTING  
YOUR ASSETS







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# BUSINESS SERVICES

CG Financial Services is your personal CFO, providing holistic financial planning for your business. Your business is the source of your financial security to live the life you want today and provides a legacy for your family in the future. We focus on your financial goals so you can get back to doing what you love: working on your business, not for your business.

A guide to maximizing business value and protecting your legacy:

- Align your business and personal goals with a plan
- Reduce taxes, increase cash flow and protect your business
- Attract and retain good employees
- Develop your business with an advisor who acts like a CFO

[BUSINESS OWNERS](#)



RETIREMENT  
PLANS



EXECUTIVE  
BENEFITS





## BUSINESS INSURANCE



## EMPLOYEE HEALTH AND WELFARE

