FFA

Florida Financial Advisors

TODAY, TOMORROW, TOGETHER

At Florida Financial Advisors, we have reinvented the concept of financial advice to help take you and your future to a whole new level...together.

At Florida Financial Advisors we have customized our services to specifically fit the financial needs of Floridians. We are a full-service comprehensive financial and wealth management firm with a keen focus on helping our clients realize their dreams. We understand how intimidating it can be to work with a large financial group, so we take a personalized approach and work together with you to navigate your financial strategy.

To us, it is vital that we work with you to not only identify your current financial situation, but anticipate what the future may bring: private school, a boat, a beach house. We have a fundamental understanding that planning for the future is all in the details, with a special focus on your career as the most important cornerstone. We take a holistic approach and factor in your company's benefits package to ensure you are maximizing your financial future.

We are committed to providing you with the very best in financial planning and exemplary customer service.

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The FFA Solution

FFA has designed unique ways to enhance your plans to grow your wealth, invest in your future and protect your family. The FFA Solution was created with "Floridian" as the centerpiece of financial success.

Since the financial crisis, major corporations have selected Florida as their headquarters. In turn, this has driven massive growth in every industry from technology to defense to health care. With great companies, comes great employees and in turn – complex benefits.

THAT IS WHERE WE COME IN

Our FFA model was designed to help you maximize your largest opportunity to accumulate assets: your employer. From robust matching 401(k)s, to stock options to pensions (yes, many Florida employers still offer pensions, something not seen with many employers), we will explore all avenues to be sure you are getting the highest return from your employer benefits package.

So whether you need guidance on financial planning, wealth management, insurance, investing, retirement, estate planning or wealth preservation – we are committed to help you navigate your financial options to ensure achievement of your financial goals.

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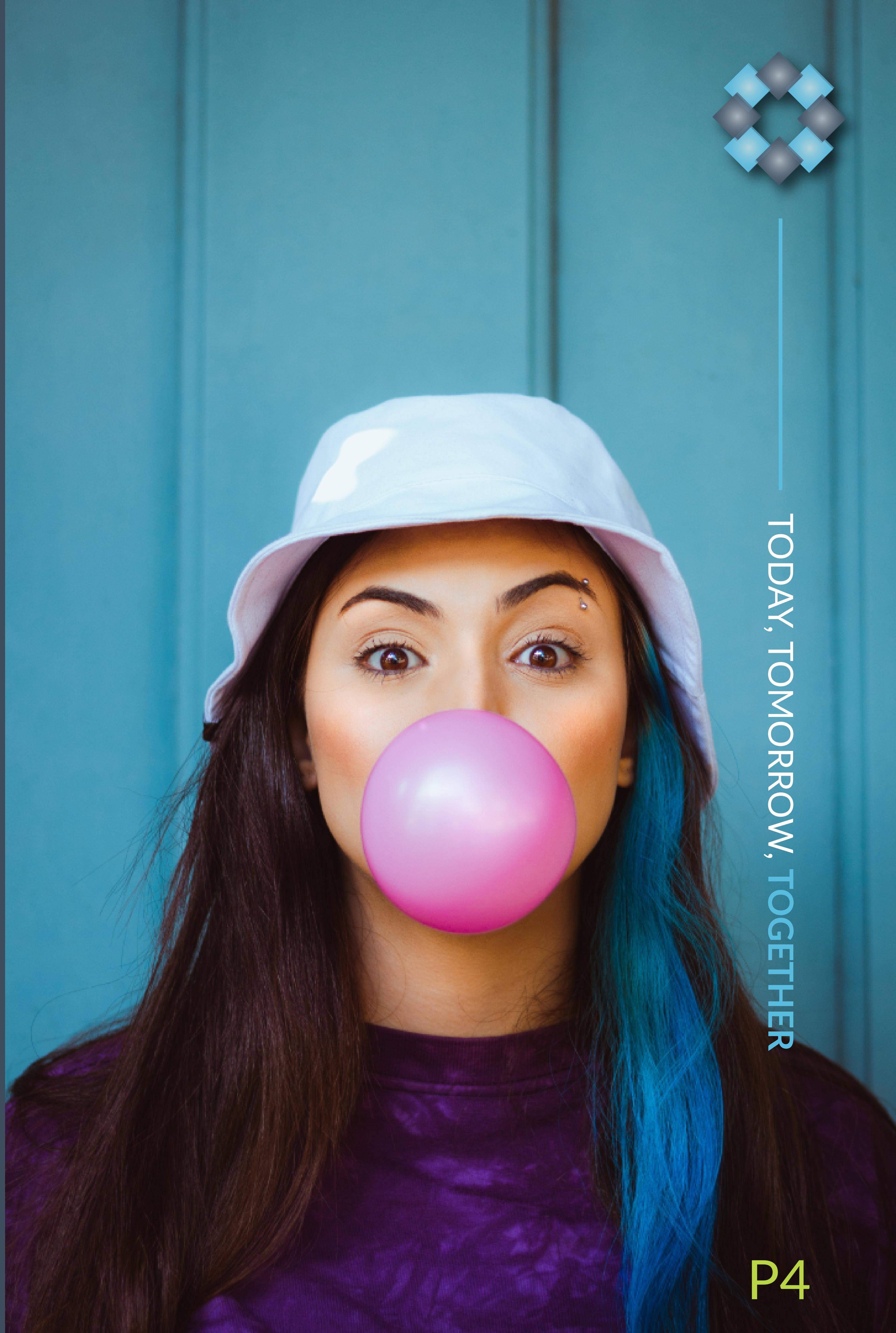
What the FFA Solution Means To You

- Improved clarity and control of your financial future.
- Profession-driven, tailored advisory approach.
- Integrated services tailored for each life stage.
- Industry leading financial research and information.
- Industry leading technology and consolidated asset reporting platform.
- Online client portal for 24/7 information and insights.
- Advanced planning tools and resources.
- Expanded network access to individualized services.



How The FFA Solution Works

The FFA Solution was created with one thing in mind. YOU.
The unique approach incorporates your personal goals, financial goals and equally important, your career goals. In a complex world of finance, having a process to ensure efficiency is critical to building wealth.

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PERSONAL

LIFESTYLE
Fixed spending analysis
Discretionary spending analysis
Risk tolerance profile
Lifestyle goals

FAMILY
Life insurance strategies
Income protection
College planning
Trust establishment
Estate planning

RETIREMENT
Goal analysis
Lifestyle planning
Succession planning strategies

UNEXPECTED
Disability
Identity theft solutions
Long-term care planning
Family hardships

PROFESSIONAL

CAREER
Anticipated financial path
Industry growth trends
Compensation sources
Equity opportunities

BENEFITS
401 (K)
Health plan considerations
Comprehensive insurance options
Deferred compensation strategies
Stock options strategies

RISK PREVENTION
High-risk promotions Travel
Cash reserve layering

INVESTMENTS
Access to capital Entrepreneurial ventures
Strategic partner deals
Participation in capital markets

FINANCIAL

TOOLS
Advanced Investments
Strategy Reporting and analysis
Clients access to online accounts
Financial calculators

EXPERTISE
Advisors with industry certifications Diverse experience
Global research and insights
Broad client scenario expertise

TRENDS
Short-term trend strategies
Alternative financial products & services
Long-term hedge strategies

OPPORTUNITIES
Emerging markets
Unique valuations
Industry/sector risk analysis

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Our Services

Our industry-certified advisors work closely with you to identify your needs within each of the following categories.

FINANCIAL PLANNING

Our path to financial success begins with understanding your unique needs and goals.

- 401(k) Strategies
- Retirement Planning
- Tax & Insurance Strategies
- Employer Benefits Optimization
- Education Planning
- Estate Planning

BUSINESS OWNER SERVICES

Whether you're a doctor or lawyer with their own practice, an entrepreneur with a growing company or the CEO and founder of a large company, running a business presents very specific financial needs and requirements.

- Owner and Executive Compensation Plans
- Qualified Retirement Plans
- Key Employee Retention Plans
- Business Succession Planning

WEALTH MANAGEMENT

We offer a wide-range of specialized services to help you grow and manage your wealth.

- Investment Advisory Services
- Tax Sensitive Investment Management
- Investment Income Strategies
- Alternate Income Strategies
- Specialized Separately Managed Account Access

ADVANCED TAX & INSURANCE STRATEGIES

We know that complex financial challenges require advanced solutions. That's why our team is armed with strategies to meet tax and insurance needs to help allow your investments to continue to grow. When engaged to do so, we can provide:

- Advanced Tax Strategies
- Actuarial Plan Design
- Advanced Insurance Architecture
- Advanced Estate Strategies

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TODAY . Turn Savings into Peace of Mind

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Real Estate Services

Through our vast partnerships, we have teamed up with industry experts to help you achieve your real estate goals.

OUR SERVICES INCLUDE

- Self Directed IRA's
- Buyer Agency Services
- Unique Financing Programs
- Foreclosure & Short Sale Negotiations
- Tax Deed Acquisitions

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