Resource Financial Group Ltd.
Second-Opinion Service

Exclusively for friends and family of our valued clients

In this challenging economy, you may find yourself in a complex financial situation or may just be unhappy with the advice you are receiving from your financial advisor—it's not uncommon. Many high-net-worth investors value a second opinion on their finances.

Who may benefit

It may be time for a second opinion review if you find yourself:

- Interested in strategies designed to maximize your family's wealth
- Wondering if your retirement strategy will be successful
- Considering the best option for claiming your pension benefits
- Considering a sale of your business
- Undertaking business succession planning
- Facing a career or job change
- Wondering how best to maximize Social Security benefits

What to expect from the second-opinion service

Resource Financial Group will meet with you and your spouse for a Discovery Meeting. Assuming that you all agree that you have a basis for working together, you will return for the Investment Plan Meeting, where you will receive a Total Client Profile and a personalized analysis of your current situation. We will either confirm you are on track to fulfill your values and achieve your goals or suggest ways in which we can help.

Working with a team that redefines wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so and you will almost certainly get ten different answers, with most heavily focused on investing. When you receive a complimentary second opinion from Resource Financial Group, however, you benefit from a cutting-edge team that has a clear and comprehensive vision of wealth management.

Wealth management

Investment consulting	+	Advanced planning	+	Relationship management
• Asset allocation • Portfolio management • Manager due diligence • Risk evaluation • Performance analysis		• Wealth enhancement, including cash flow, tax minimization and liability management • Wealth transfer • Wealth preservation • Charitable giving		• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

The consultative process used by Resource Financial Group

Resource Financial Group approaches each new engagement with a consultative process. This allows them to have an open dialogue in which they learn about every client's values and goals while working with them to tailor a plan to help achieve them.

Let us help you help address your most important financial concerns. Contact us today to arrange a complimentary second opinion review.

Peter M. Maris, CFP®
Founder and
Wealth Manager

Resource Financial Group, Ltd.
1000 Skokie Blvd., Suite 525
Wilmette, IL 60091
847-256-7495

peterm@rfgltd.com
www.rfgltd.com