Second-Opinion Service

Exclusively for friends, family and associates of our valued clients

In this challenging economy, you probably know a friend, family member or colleague who may be in a complex situation or just unhappy with the advice from his or her financial advisor—it's not uncommon. We believe that many high-net-worth investors would value a second opinion on their finances.

In order to help the people you care about pursue their financial goals, we have created a complimentary second-opinion service. We are pleased to offer your friends, family members and associates the same experience and guidance that you have come to expect as a valued client of Fusion Financial Group.

Working with a team that is seeking to redefine wealth management

Ask ten investors to define wealth management. Actually, ask ten "wealth managers" to do so. You will almost certainly get ten different answers, with most heavily focused on investing. As a client of Fusion Financial Group, however, you will work with a 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 management and tax minimization • Wealth transfer • Wealth protection • Charitable giving	• Regularly scheduled calls, reviews and in-person meetings • Team of professionals, including legal, tax, insurance and investment advisors

10488 W. CENTENNIAL RD #406, LITTLETON, CO 80127 // 303.388.2466 // WWW.FUSIONFINGROUP.COM

OUR CONSULTATIVE PROCESS

We approach each new engagement with a consultative process. This allows us to have an open dialogue in which we learn about every client's values and goals while working with them to tailor a plan to pursue them. As a valued client, you will recognize the five steps below as the process you have experienced with us. Through our second-opinion service, your friends, family members and associates can enjoy a portion of this experience with no obligation to become a client.

Full client experience

Discovery Meeting → Investment Plan Meeting → Mutual Commitment Meeting → 45-Day Follow-up Meeting → Regular Progress Meetings

WHAT TO EXPECT FROM OUR SECOND-OPINION SERVICE

We will meet with your friends, family members and associates for a Discovery Meeting. Assuming that we both agree that we have a basis for working together, they will return for the Investment Plan Meeting. Hopefully, we can confirm they are on track to fulfill their values and achieve their goals with their current financial provider. If needed, we will suggest ways in which we can help, including recommending another provider if we are not a good fit for their needs. Either way, they will receive a Total Client Profile and a personalized analysis of their current situation.

Second-opinion service

Discovery Meeting → Investment Plan Meeting

LET US HELP YOU HELP THOSE YOU CARE ABOUT. CONTACT US TODAY!

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