Offering Story –

Betty’s husband passed 1.5 years ago

Hard earned retirement through Betty’s husbands career as a physician

Husband was in charge of finances

Betty was told she wouldn’t have enough to retire, and even was told she needed to give up her beloved Symphony tickets

RFA client was at the dinner party, and pulled Betty aside to discuss RFA

First meeting was focused on decreasing her tax bill by taking money from a different account

Saved over $25,000/year in taxes

Betty can in fact still keep her beloved Symphony tickets

Financial Situation Story –

Kelly worked for 25 years as a doctor before being diagnosed with terminal cancer

Rose stayed at home to raise their now-grown children

Had been burned in the past by a family friend who sold them annuities with high fees

Needed a trusted advisor to help Rose navigate the finances when Kelly passed

Came as a referral from a former colleague

Met the entire team, including the President

Family Wealth Transition meeting with all family to help navigate the waters as Kelly’s health regressed

Two years after becoming clients, Kelly passed away

Rosie has been a client for over 15 years

Mike, their son, became a client

Janet, their daughter, calls occasionally for advice on her 401(k)

Referral Process Story –

Entrepreneur Mary

$1M and RFA paid tax return

Jim expressed anxiety about impending retirement at neighborhood BBQ

Mary referred Jim to RFA through a lunch meeting

$50 Amex card and $200 charity donation

Mary wants to refer seven friends to donate to all seven charities

White Glove –

Outpatient Surgery

Late for review

First visit to RFA office

Welcome screen

Fresh cookies

No food pre-surgery

Too late to have lunch

Michele prepared a hot plate of leftover pasta

Client returns with welcome treats often