# TOP 5 REASONS TO PARTNER WITH CG FINANCIAL SERVICES





## SINGLE POINT OF CONTACT

You'll be assigned a dedicated point person from our service teams to foster immediate, efficient communication and problem solving. No frustrating call centers here!



## CUSTOMIZED SOLUTIONS

We'll work with you to identify your unique needs, goals, and challenges to deliver a customized retirement plan solution that suits your plan best. One size fits all? Nope.



# FULL TRANSPARENCY

When managing an investment in employees as significant as a retirement plan, you want an advisor that can function as your independent, objective fiduciary. We have your best interest in mind—we're not just pushing product.



# **DEFINING ROI**

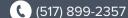
There's a lot of moving parts, right? Investment options, service providers, internal personnel, fiduciary obligations...You can leverage this burden onto us while we help you define your return on investment for offering this benefit.



## SERVICE PROVIDER OPTIMIZATION

We can integrate with your service providers and vendors to streamline synergies and discover greater efficiencies. Through our benchmarking process, we often find cost savings.

Working with us will ensure your retirement plan has a best-in-class investment lineup, your fiduciary liability is decreased, costs are competitive, and employees are receiving all the retirement benefits they deserve.







Advisory Services offered through CG Advisory Services, an SEC Registered Investment Adviser. Securities offered through LPL Financial, Member FINRA/SIPC. Investment Advice offered through Capital Asset Advisory Services, LLC., CG Advisory Services, and CG Advisory Network are separate entities from LPL Financial. Registration with the SEC does not imply a certain level of skill or training. Advisors associated with CG Advisor Network may be either (1) registered representatives with, and securities offered through LPL Financial, Member FINRA/SIPC, and investment advisor representatives of Capital Asset Advisory Services, LLC. dba CG Advisory Services; or (2) solely investment advisor representatives of Capital Asset Advisory Services, LLC. dba CG Advisory Services, and not affiliated with LPL Financial.