



# ADVANCED CAPITAL GROUP

## Individual Investment Management

### CREATING A PLAN IS EASY WITH ADVANCED CAPITAL GROUP

Personal investments are just that—personal. Our financial professionals provide comprehensive advice and custom investment solutions that will help you have a confident financial future. Any recommendations we share with you are unbiased—ACG is an independent fiduciary, not a commission broker.

Regardless of your asset totals, we can help with questions like:

- ▲ When should I take Social Security?
- ▲ How much do I need to maintain my lifestyle in retirement?
- ▲ How should I use the funds I've saved?
- ▲ What will my heirs receive when I'm gone?

### FULL SUITE OF INVESTMENT SERVICES

Not sure where to start? Wondering where your investments stand? Nearing retirement and need smart strategies? We're ready to help at any stage.

Gain a firm understanding of what to expect and steps to take with customized guidance and flexible financial solutions like:

- ▲ Automated investment programs
- ▲ Custom-managed solutions
- ▲ Retirement plan distribution options if you're curious how to turn the nest egg you've secured into income

### Put our vision to work for you

We are passionate about fostering creative ideas and exploring new opportunities for our clients. Contact us to learn how a customized relationship can help you succeed.

### AWARD-WINNING SERVICE

Advanced Capital Group is a consulting firm and Registered Investment Advisor (RIA) based in Minneapolis, MN. Our expert team uses a proactive and collaborative approach that enhances financial results for organizations and individuals.

**Wondering if you're on  
track for retirement?  
Working together, we can  
help you feel prepared to  
answer questions about  
your financial future.**

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## YOUR FIDUCIARY RESOURCE

Since 1998, Advanced Capital Group has worked as a trusted fiduciary advisor—our fee-only compensation means we always put your interests first with unbiased advice. There are no insurance sales programs. You'll get direct advice and tailored recommendations on the financial aspects that make the most sense for your life, which can include:

- ▲ Custom investment portfolios
- ▲ Investment analysis and review
- ▲ Portfolio risk analysis
- ▲ Integrated investment and plan reporting



## PERSONALIZED RETIREMENT REVIEWS

Advanced Capital Group will consult with you to develop a comprehensive retirement plan. We'll talk about your concerns, expectations and goals. Using our advanced planning technology, your financial professional will create customized solutions for your unique needs. We can help with:

- ▲ Social Security planning and income review
- ▲ Planning for large purchases and goals
- ▲ Healthcare and college-cost planning
- ▲ Legacy planning
- ▲ Tax-free retirement income planning

## PROJECT OR ANALYSIS PLANNING

In addition to support with investments and retirement planning, you can collaborate with us to address your total financial picture with supplementary services like:

- ▲ Insurance policy and annuity review
- ▲ Rental property cost and return analysis
- ▲ Debt reduction and paydown strategy review
- ▲ Estate plan document review and referral

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