

Summation

Our years of experience in offering comprehensive estate, business and financial planning services gives us the distinct advantage of being able to guide our affiliates through the process of achieving independence.

TAG's program services are specifically designed to give our affiliated professionals all the advantages of operating independently, without the inordinate responsibilities and risks associated with operating under their own individual RIA/broker-dealer firm.

We are prepared to commit the resources necessary to achieve a successful, long term relationship with each of our affiliates. If you are interested in learning more about TAG and the benefits of independence, please call:
William H. McCance, President at (781)942-5070.



Send or fax back the reply card and you will be entered in a drawing to win 2 Bruce Springsteen tickets, CLUB SEATS!



Trust Advisory Group, Ltd.
161 Ash Street, Reading, MA 01867

Tel: (781) 942-5070
(866) 661-0130
Fax: (781) 942-5075

Securities offered through Advisory Group Equity Services, Ltd.,
member FINRA/SIPC

Declare your INDEPENDENCE



TRUST ADVISORY GROUP, LTD. • A REGISTERED INVESTMENT ADVISOR

Trust Advisory Group, Ltd.

TAG is a leading provider of estate, business and financial planning services for both high net worth individuals and businesses. We maintain a comprehensive network of independent legal, financial and accounting professionals who are committed to providing the highest level of service to their clients.

Through both our corporate RIA and broker-dealer units, **TAG** offers a unique distribution platform to qualified professionals seeking the autonomy of operating their own Financial Services practice without incurring the added pressures that are inherent when operating as an individual RIA/broker-dealer firm.

It is our steadfast belief that developing a Financial Service practice takes an enormous amount of time and effort. Given the multi-level regulatory complexities of operating an individual RIA/broker-dealer firm, **TAG** is committed to providing our affiliates with all the benefits of “going independent” while at the same time, providing them with all the support and services they require in order to succeed.

Benefits of Affiliation

In determining whether a strategic affiliation with Trust Advisory Group is appropriate for you, we encourage you to consider just a few of the key benefits we have to offer:

TAG offers a wide range of financial products and services to help meet the varying needs of your clients, and our excellent payout schedule and low clearing costs means you keep more of what you earn.

TAG offers strong and reliable back office, legal and compliance support. Our “Quick Response Service Policy” means that our staff members will always be readily available to answer any questions that either you or your clients may have.

TAG offers comprehensive referral programs and provides client ready brochures, seminar materials and multi-media planning presentations to aid you in building your practice.

TAG offers advanced technological capabilities, ranging from electronic internet brochures to on-line research, TAG will provide you with systems designed to enhance the overall quality of service that you provide to your clients.

TAG offers flexibility. We fully understand that our affiliates are not all alike, and that their individual needs often vary. Our program services will be exclusively customized to meet your individual needs.

Succinctly stated, **TAG** is offering unparalleled support services, designed specifically to enable you to effectively grow your business. We are committed to developing a long term working relationship with you and your clients, and to guide you through the process of achieving independence.



Developing Strategic Affiliations

At **TAG**, we fully appreciate and understand the complexities of transitioning your business. As a new TAG affiliate, you will automatically be entitled to all the benefits and support services the firm has to offer.

To enable you to make the most of your affiliation with **TAG**, we will work closely with you to develop program services that will meet your unique requirements and specifications.

Prior to becoming affiliated with **TAG**, we will meet with you to discuss your overall objectives. We will also use that opportunity to address any issues and/or concerns that you may have.

Upon helping you to identify your objectives, we will work with you to draft and implement a formalized business plan. The resulting document will ultimately serve as the blueprint from which we build our mutual affiliation.

Based on your stated needs and objectives, **TAG** will assign a Senior Executive Officer (SEO) to assist you in transitioning your business under our corporate umbrella, and he/she will serve to advise you, on an as needed basis, in all aspects of your professional development. The SEO will prove indispensable in lending his/her expertise in a number of critical areas, including:

- Product Selection;
- Budgetary/Expense Planning;
- Portfolio & Account Systems;
- Technology Services;
- Split-Cost Marketing/Seminars;
- Legal & Compliance;
- Networking; and
- Training & Development.