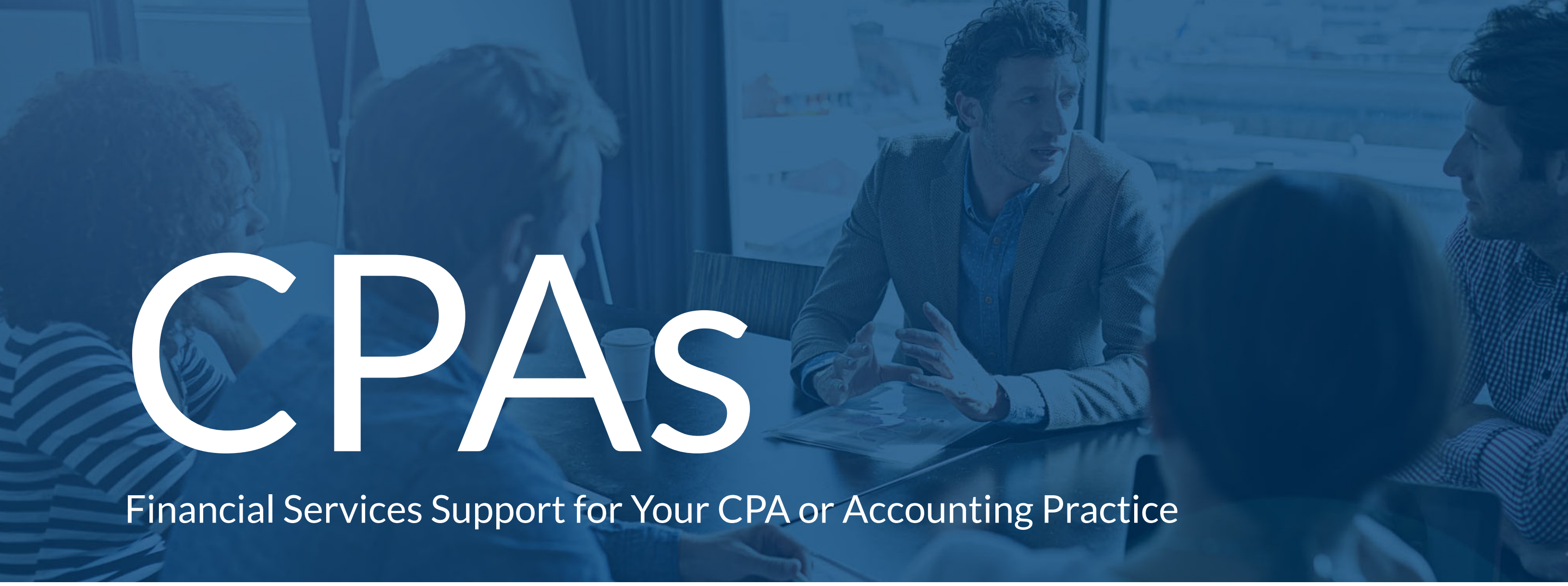

CPAs

Financial Services Support for Your CPA or Accounting Practice

What Clients Expect of Their CPA has Changed.

In years past, professional borders were easier, and your tasks clearly defined. Today, clients need and expect more, and financial services have become harder to ignore. Whether you're a sole practitioner or part of a larger firm, you're now faced with a series of decisions.

"How do you best address a wider range of a client's interconnected financial needs?"

At 4Thought Financial Group, we can make those decisions easier. We offer comprehensive wealth management and investment management services that complement your accounting practice. Most importantly, we help you deliver more without changing your business structure.

You can partner with us informally or formally, depending on your needs. You can take advantage of our personnel, training, and access to information systems. Leveraging our services, you can also add a profit center to your firm without putting sales pressure on your clients.

In the end, our goal is to provide options that help you work in a more holistic way so your clients' financial freedom becomes possible.

4Thought Financial Group Offers Continuing Professional Education (CPE) for CPAs

Partner with 4Thought today and expand your role in your clients' financial lives

Through an investment portfolio sub-advisory or solicitation agreement you can partner with us and take advantage of our personnel, training, resources and support. By leveraging our services, you can also add a profit center to your firm without the additional sales and revenue pressures. In the end, our goal is to provide options that help you work in a more holistic way so achieving your client's financial goals becomes easier.

- Work With Independent, Objective Fiduciaries Like Yourself
- Tap Into A Brain Trust Of Financial Planning Technical Resources
- Gain Access To An Entire Team And Establish A Firm-To-Firm Relationship
- Bring Institutional Quality Portfolio Management To Your Clientele

4THOUGHT FINANCIAL GROUP

1-516-300-1617 info@4tfg.com www.4tfg.com

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CPAs

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WORK WITH INDEPENDENT, OBJECTIVE FIDUCIARIES LIKE YOURSELF

As a CPA, the quality of the advice that you provide to your clients is of the highest importance, and establishing systems for maintaining that quality is the conduit to achieving that goal. Just as you are held to a fiduciary standard in your accounting, advisory, or attestation practice, 4Thought is held to the same standard as an independent SEC Registered Investment Adviser (RIA).

In addition, we've been very careful to structure our firm and its programs to ensure the alignment of our incentives with the goals of your clients and to minimize and fully disclose any potential conflicts of interest. We are an independent firm that is not owned by or affiliated with any other company that might require us to sell a certain quota of their proprietary products.

Also, we work on a fee basis (not a commission basis) and we do not have production requirements for our advisors (so there is no sales pressure on your clients). Furthermore, we can establish our own firm-to-firm agreements with vendors and providers, which allows us to seek out and deliver what we believe are the best financial solutions or products available throughout the universe of available resources.

We believe that this infrastructure and the intensive specialized training we provide to our constituents make us a little more objective and a little less biased in dealing with your clientele, helping to make you more confident in the relationships you create with us.

GAIN ACCESS TO AN ENTIRE TEAM AND ESTABLISH A FIRM-TO-FIRM RELATIONSHIP

When you partner with a financial services provider that you are entrusting with your client relationships, it's important they will be able to deliver the high level services your clients require.

The problem with partnering with a sole practitioner or a wirehouse group in the financial services industry is that they will either not be able to provide you with level of service you're seeking with your clients (because no one person can do everything), or you'll get lost in the shuffle of a huge bureaucracy that is not particularly interested in catering to your needs, but may be more interested in selling a proprietarily underwritten financial product to your clients.

We give you the opportunity to establish a firm-to-firm relationship with an independent boutique that uses a team approach to deliver white-glove services to you and your clientele, and while providing you with a primary point of contact, will also offer you the ability to select from team members as you deem appropriate.

The benefit of the firm/team approach (as opposed to having a relationship with a single individual provider) is that you are not dependent on the whims of any one person, so that you can access the expertise and the personalities you need, when and where you need them.

TAP INTO A BRAIN TRUST OF FINANCIAL PLANNING TECHNICAL RESOURCES

In addition to client relationship managers and generalist financial planners that typically work directly with clientele, we maintain a stable of specialists in various areas of financial planning and wealth management so that you can tap into our resources on demand, to simply pick the brain of an expert, attend our remote-access training sessions, or use our fee planning department to generate documents and recommendations for delivery to your client.

OUR FOUR PRIMARY AREAS OF FINANCIAL PLANNING EXPERTISE ARE:

- Investment Planning
- Business Succession
- Estate Planning
- Fringe Benefits

BRING INSTITUTIONAL QUALITY PORTFOLIO MANAGEMENT TO YOUR CLIENTELE

When it comes to actually implementing your clients' financial plans, we provide an investment management platform for these purposes that was built with the practical day-to-day needs of CPAs and their firms in mind. 4Thought Financial Group claims compliance with the Global Investment Performance Standards (GIPS®)*. But while a transparent, razor sharp focus on portfolio performance is always important, providing adaptable resources and services to the CPA and his/her firm are paramount.

- **Multiple investment methods in one shop**– to create all-weather portfolios prepared for ***Bull, Bear, Wolf, and Eagle markets***
- **Separately Managed Accounts** - with a unique ***"Think Outside the Style Box"*** mindset for institutions, or a hands-on advisor/firm
- **Turnkey total portfolio management** - for those that want simplicity for their business and their clients
- **Flexible modular design** – including wrap pricing, low investment minimums, custom portfolios, and consolidated web-based reporting

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Investment advisory services offered through 4Thought Financial Group Inc., an SEC Registered Investment Advisor. *The GIPS firm definition excludes any third party asset management programs over which 4Thought maintains oversight advisory agreements on behalf of its clients, any arrangements under which 4Thought provides recommendations for client self-implementation, and any assets under advisory but not under direct management (in which 4Thought provides allocation changes or trading signals to third party firms but does not take discretion over the trading of client accounts). For a list of composite descriptions or to obtain a fully compliant GIPS Performance Disclosure Presentation please email 4Thought at info@4tfg.com.