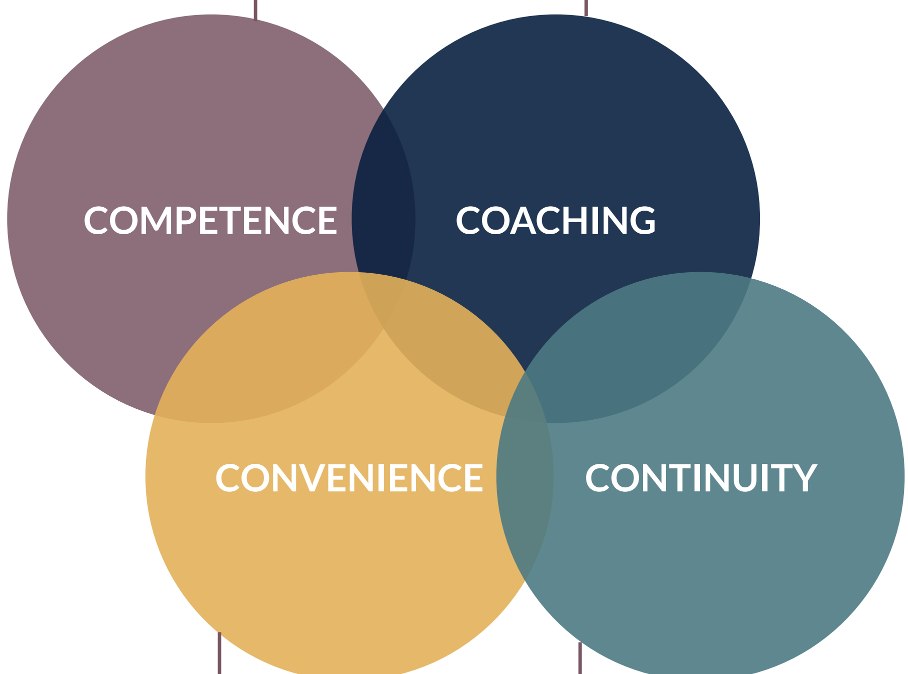
WHY CLIENTS CHOOSE Affinity FINANCIAL

Financial planning
Holistic integration
Investment selection & monitoring
Asset allocation & rebalancing
Risk management
Income strategies
Tax/estate considerations
Specialized expertise

Peace of mind
Education
Adherence to plan and goals
Emotions, biases and stress
Objective feedback
Trusted second opinion
Life / business transition



Time savings
Personalized service
Coordinate trusted professionals
Reporting
Integrated technology

Spouse involvement
Children engagement
Multigenerational planning
Legacy
Philanthropy

Derek Pantele is an Investment Advisor Representative with Dynamic Wealth Advisors.
All investment advisory services are offered through Dynamic Wealth Advisors.

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