CSENGE
ADVISORY GROUP
ASSET MANAGEMENT FOR LIFE™

# Wealth Management Tailored to You.


Reaching your financial goals for major life events can seem daunting. Will you be able to establish a legacy for future generations? Will you make the proper tax moves now so your retirement is everything you've dreamed? Will your wish to provide for charities and causes become reality? At Csenge Advisory Group, it's our mission to remove the uncertainty and keep you on track toward your goals.

### Transparency and Trust.

Planning with Csenge Advisory Group means you will always know where and how your money is being invested—no jargon, no confusion. More importantly, all the decisions we make will be in your best interests (the highest fiduciary standard of business). We have no ties to any particular investment product or firm and are only concerned with what you need.

Our Wealth Portal gives you complete account access whenever you need it. In addition, you'll receive regular statements, informative newsletters and emails, and invitations to our frequent educational events.

### Common Sense Collaboration.

Working with us is like having a conversation with a good friend: straightforward, genuine, and focused on what's important to you. We also work with your schedule. Our financial planning process involves three easy steps:

- **Discovery Meeting.** In this initial session, we get to know your current financial picture, what you're looking for in an advisory firm, and how we can help. You'll do the talking; we'll do the listening.
- **Planning Meeting.** This is when we'll discuss possibilities by exploring several "what-if" situations and by looking at how your money may grow in the coming years. We'll also fully explain the fees involved with our planning services.
- **Implementation Meeting.** Soon afterwards, we'll complete the paperwork, open your new accounts, and discuss next steps.

### Take the First Step.

Any of our financial advisors will be happy to answer your questions and schedule a discovery meeting. We look forward to helping you achieve everything you want in life.

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