AXIAL FINANCIAL GROUP®

Centered On You

www.axialfg.com

AXIAL
AT A GLANCE

Comprehensive Financial Services. Centered On You.

Axial Financial Group is a privately-held, independent financial services firm specializing in wealth management and retirement planning. Our integrated approach means serving the needs of our clients and their trusted professionals, like CPA's and attorneys, on a wide array of business and personal matters. This enables our clients to seamlessly interact with us and move closer to their financial goals.

At Axial Financial Group, we take an integrated approach to wealth management, driven by a deep understanding of your needs and goals. We offer a comprehensive array of financial services, and ensure complete coordination of all aspects of accumulating, protecting, and distributing assets, while keeping aspects like cash flow, estate, and tax implications in mind.

Our mission is to enable our clients to take full advantage of all of life's possibilities. Working with Axial Financial frees time to focus attention on business opportunities, spending time with family, and enjoying hobbies.

30+
Professionals

$2.3 Billion
in assets under management
as of December 31, 2023

Four Locations

- Burlington, MA
- Lynnfield, MA
- Marina Bay, Quincy, MA
- Hyannis, MA

OUR PROMISE

At Axial Financial Group, you are the center point of all we do. You can benefit from our independent financial advising team's specialized experience, knowledge, and capabilities, which always revolve around you and your needs, wants, and goals.

We will act in your best interest and provide independent advice centered on achieving your lifetime dreams; by designing a plan for each independent circumstance depending on your risk tolerance, time horizon, and goals.

Our Axial team can even partner with your other trusted advisors, including CPAs, insurance professionals, tax accountants, estate planning attorneys, and Medicare consultants, to coordinate a cohesive approach to meet all your financial planning needs.

As part of our promise and commitment to providing you with the best possible financial advice, we prioritize our team's professional development with specialized training throughout the year.

Our Industry Expertise

- 8 Certified Financial Planners CFP ®
- 6 Accredited Investment Fiduciaries AIF ®
- 2 Chartered Financial Consultants ChFC ®
- 2 Certified in Long Term Care CLTC ®

Plus, experienced specialists in individual fields:

- Certified Public Accountant CPA ®
- Certified Divorce Financial Analyst CDFA ®
- Certified Retirement Counselor CRC ®
- Certified Fund Specialist CFS ®
- Financial Paraplanner Qualified Professional FPQP ®
- Chartered Retirement Planning Counselor CRPC ®
- National Social Security Advisor NSSA ® *
- Fellow Health Insurance Advanced Studies FHIAS

This can be added at the end with the other disclosures but if so, it will need to still have the asterisk: *Neither the National Social Security Association, its certification, National Social Security Advisor, nor any advocate/certificant associated with it is in any way affiliated or endorsed by the United States government or the social security administration

OUR CORE SERVICES

Axial Financial Group pursues answers to the difficult financial decisions faced by individuals, executives, business owners, and their families. With the help and support of Commonwealth Financial Network®, our chosen RIA and broker dealer, we're able to best help you pursue your financial objectives.

Our wealth management program considers **six distinct but interrelated aspects of wealth management:**

Retirement Planning

Evaluates your current financial status and produces an accumulation strategy that can help you attain your desired retirement lifestyle. A successful plan, ideally put into place well before retirement, fosters asset growth and tax-efficient distributions through retirement, as well as distribution of retirement assets to the next generation.

Corporate Planning

Designs a company sponsored retirement strategy that helps benefit owners and employees to best prepare for retirement readiness. Consultation on business structure, risk mitigation strategies between partners and succession are also explored.

Accumulation

Defines appropriate asset allocation targets and portfolio composition in light of your needs, goals and risk tolerance. Accumulation strategies ensure that your investment portfolio remains closely aligned with your overall financial goals as you continue to build your asset base.

Taxation

Considers the tax implications of financial planning, individual, investment, or business decisions. While decisions must consider much more than tax impact, it is important to understand income and estate tax issues, and reduce or eliminate tax liability where feasible.

Estate Planning

Creates and implements a master plan for the management of your property during life, and the distribution of that property at death. Working in concert with an estate planning attorney, we facilitate plans that provide more control of your assets, ensure care if you should become disabled, and allow for efficient, low cost transfer of wealth at your death.

Risk Management

Works to minimize financial and other potential losses associated with risks to your assets, income, or business. The key first step is to identify sources of risk - including personal and professional liability, business ownership, property loss, and catastrophic illness or disability — and help systematically eliminate or mitigate exposure to loss.

OUR PROCESS

Personalized & Unique **Designed for You**

1. Understanding Your Personal Circumstances
2. Identifying Your Goals
3. Analyzing and Developing Your Financial Plan
4. Presenting Your Financial Plan
5. Implementing Your Financial Plan
6. Monitoring and Updating Your Financial Plan

To start, we want to get to know you, your family, and your lifestyle personally. It's important to know your current financial circumstances, so we can best plan for your future.

Next, we'll begin to identify your financial goals, wants, and wishes. Once we get a full understanding, we will collaborate with our team to diligently craft your personal financial plan, and work towards getting you as close to those goals as possible, while reviewing all of your assets and considering your liabilities.

Then, using our cutting edge financial and tax planning software, we will present our recommendations to you. Your advisor and our in-house portfolio management team will implement your plan by investing in the specific portfolios we have agreed upon, while working together towards your goals in other areas as well.

Over time, all plans will need to change as our lives are always changing. We take an ongoing initiative to monitor your personalized plan closely and modify as needed. From the very beginning, you will be involved along every step of the way.

OUR COMMITMENT TO GIVING BACK

Community is more than just belonging to something; it’s about doing something together that makes belonging matter.

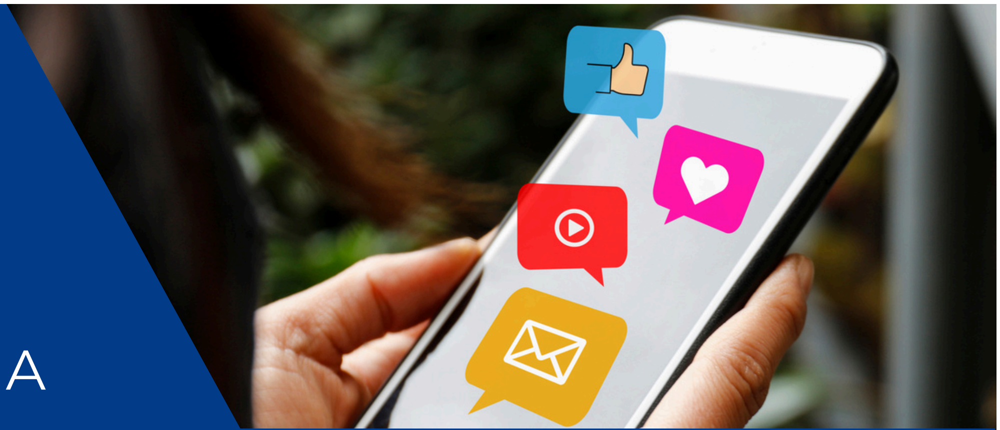
As an extension of who we are, Axial is proud to be an integral part of our local Massachusetts communities.

We work with local, regional, and wider organizations to support and empower our friends and neighbors.

A few of the causes we continuously support:

- School On Wheels of Massachusetts
- Lazarus House Ministries
- Massachusetts Breast Cancer Coalition
- American Red Cross
- People Helping People through the Burlington Food Pantry
- Habitat for Humanity
- Cape Kid Meals
- WE CAN Women Empowerment
- Mass Audubon
- Bishop Guertin High School
- Autism Speaks

CONNECT WITH US ON SOCIAL MEDIA



Axial is an active part of the social media community. Whether we're posting blogs or articles from our website, like weekly market updates and other important news, or posting a recap of our most recent events, we love to keep our clients in the loop.

Stay connected with us!

on Facebook @AxialFinancialGroup

on LinkedIn @AxialFinancialGroup

on Twitter @TheAxialCompany

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