# CPA Alliance Program

Your FINANCIAL FUTURE begins EVERY DAY.

comprehensive financial

*Let us show you the way.*

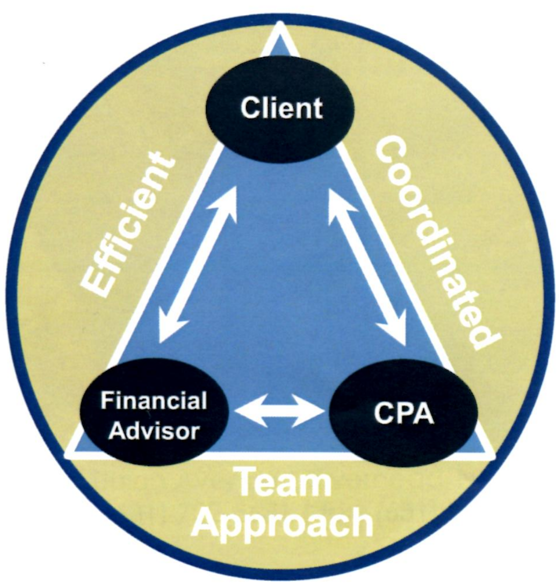
FOR FINANCIAL PROFESSIONAL USE ONLY.
NOT TO BE USED WITH THE GENERAL PUBLIC.

The scope of your relationship with your clients can be summed up in one word – ***Trust***. And as the financial world continues to evolve, accounting professionals are relied upon more frequently than ever to advise their clients not only on tax related matters, but on a whole host of financial issues that affect their lives. Because you understand the "big picture" and how important it is to coordinate the many pieces of a client's financial needs to maximize their benefits, you need Comprehensive Financial on your team.

Comprehensive Financial has been providing unbiased, independent guidance for our clients in the areas of Financial Planning, Wealth Management, Insurance, Retirement, Employee Benefits and Human Resource Consulting for over 20 years. Through a strategic partnership with Comprehensive Financial, you will have access to all of our resources to help manage your client's financial needs and goals with the help of our knowledgeable staff of CERTIFIED FINANCIAL PLANNER™ practitioners (CFP®), Certified Senior Advisors (CSA®), Wealth Managers and Employee Benefit Consultants. As a "partner" under the CPA Alliance, you would be entitled to receive compensation through the fees collected for the services and products recommended for your client's goals and objectives.

## Key Benefits to CPA Alliance Partner

- Grow your practice by offering a comprehensive suite of financial services that compliment your accounting practice.
- Client retention through your expanded financial consulting and product services.
- Business-building opportunities through networking and referral opportunities.
- Marketing support to promote and position you and your firm as a trusted financial advisor.
- Continuing education.
- Revenue sharing on fee-based services.




## Client Benefits

Given today's complex compliance regulations and accounting rules, a team approach, partnering accounting professionals like yourself with knowledgeable financial advisors, offers clients the centralized approach they desire for addressing their unique financial needs and goals. By providing access to services that go beyond those traditionally offered by accounting firms, YOUR TEAM of unbiased professionals powered by YOU and Comprehensive Financial will solidify long-term relationships and strengthen the likelihood of client retention.

**A** professional alliance between you and Comprehensive Financial provides clients access to a full range of wealth management services, including:

## Investment Management Platforms:

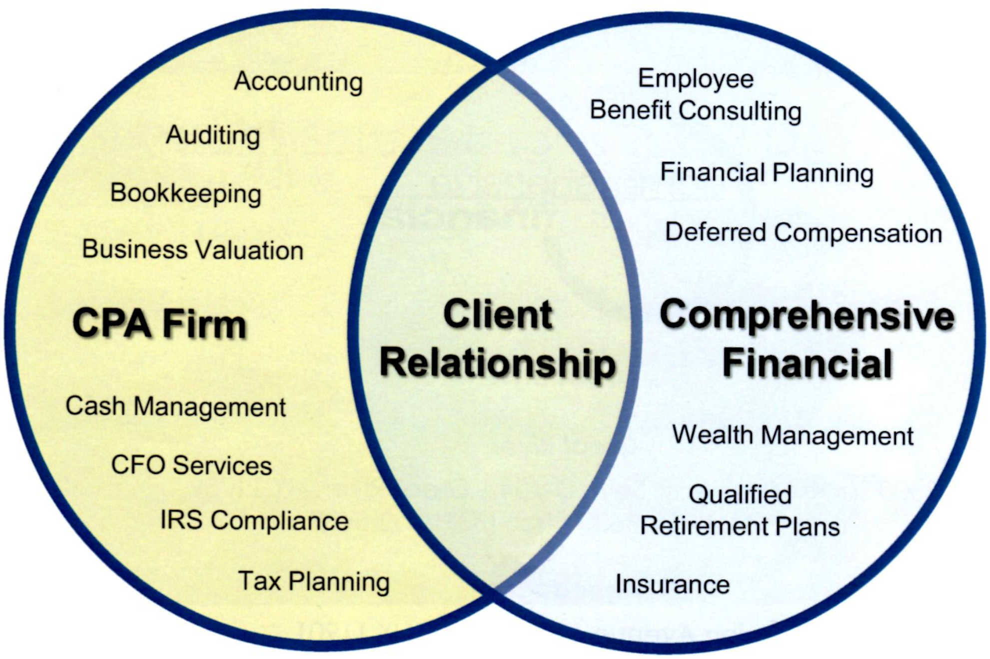
- Tactical & Strategic Asset Management
- Stocks, Bonds, ETFs and Mutual Funds
- Institutional Separate Accounts
- Systematic Investment Strategies
- Alternative Investments
- Automatic Rebalancing
- Customized Asset Allocation
- Annuities

## Additional Financial Services:

- 401(k), 403(b), Profit Sharing, Defined Benefit Plans
- Financial Planning
- Estate Planning
- Trust Services
- Insurance services
- College Savings Strategies

## Employee Benefits & Human Resource Consulting:

- Retirement Plans
- Life & AD&D
- Short & Long-Term Disability
- Long-Term Care
- DBL
- Section 125 Plans (P.O.P)
- Health Insurance
- Dental Insurance
- Workers Compensation
- Vision Care
- Voluntary Benefits
- Human Resource – Vulnerability Audits




## Providing an Extension of the Services You Offer

When forming a professional alliance with Comprehensive Financial, it benefits not only your clients, but you as well. Clients view the additional services being offered by Comprehensive Financial as an extension of the services you offer, further solidifying your bond with them.

## Advantages of Developing a Professional Alliance

Here are some of the key advantages of developing a professional alliance with Comprehensive Financial:

- Provide your clients with value-added services that contributes to long-term client retention.
- Provide your clients with a team approach to manage their financial needs with YOU coordinating the services.
- Offer financial planning, insurance, wealth management and employee benefit related services to compliment your accounting practice.
- Generate additional revenue for your firm without any capital investment on your part.
- Partnering with the right financial advisor can provide objective, unbiased and intelligent financial advice for your clients.

## We Make It Simple

Comprehensive Financial has designed this program to work efficiently between yourself, our firm and clients. We will provide all the necessary financial planning disclosures documents and service agreements to use and will handle all of details to make it easy for you to get started. *Note: Licensing requirements are based on your state's Board of Accountancy.*

## Our Next Steps: Designing a Relationship Agreement

There are multiple ways to design a relationship agreement that is beneficial to both you and Comprehensive Financial. We would be happy to discuss these options with you in more detail. Please contact us at...

comprehensive financial


### Locations:

**_Great River_**

3500 Sunrise Highway, Suite D-104 | Great River, NY 11739
ph: (631) 952-8600 | fax: (631) 952-8608

**_Aquebogue_**

727 Union Avenue | Riverhead, NY 11901
ph: (631) 722-5681 | fax: (631) 722-5683

**_Melville_**

320 South Service Road | Melville, NY 11747
ph: (631) 650-4033 | fax: (631) 981-7681

**www.comp-financial.com**