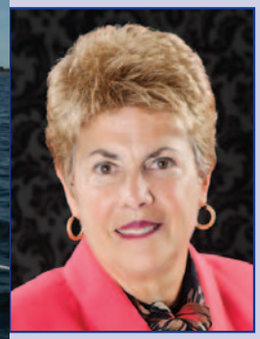
## *We help you meet multiple goals.*

- Retirement
- Children's Education
- Vacation Home
- Dream Trip
- New Boat
- Charitable Giving

## *Meet Charlotte A. Mullen CFP, CLU, ChFC Principal*



Founder and President of Strategic Financial Advisory Services, Charlotte Mullen is a Certified Financial Planner and Registered Investment Advisor. Ms. Mullen's background includes an advanced degree in economics as well as 26 years of financial planning experience. Her associate, Kathleen Governale is also a Certified Financial Planner. Together with their staff they provide the highest level of customer response and individual personal service.

Founded in 1986, Strategic Financial Advisory Services is registered with the Securities and Exchange Commission, our Broker/Dealer is JW-Cole.*

Find out how you can benefit from our experience. Visit our website at: www.strategicfinancialadvisory.com.

**Securities offered through J.W. Cole Financial, Inc. Member FINRA, SIPC Advisory Services offered through Strategic Financial Advisory Services Strategic Financial Advisory Services and J.W. Cole Financial, Inc. are Independent companies*

**For a free consultation, call 630-250-9990.**

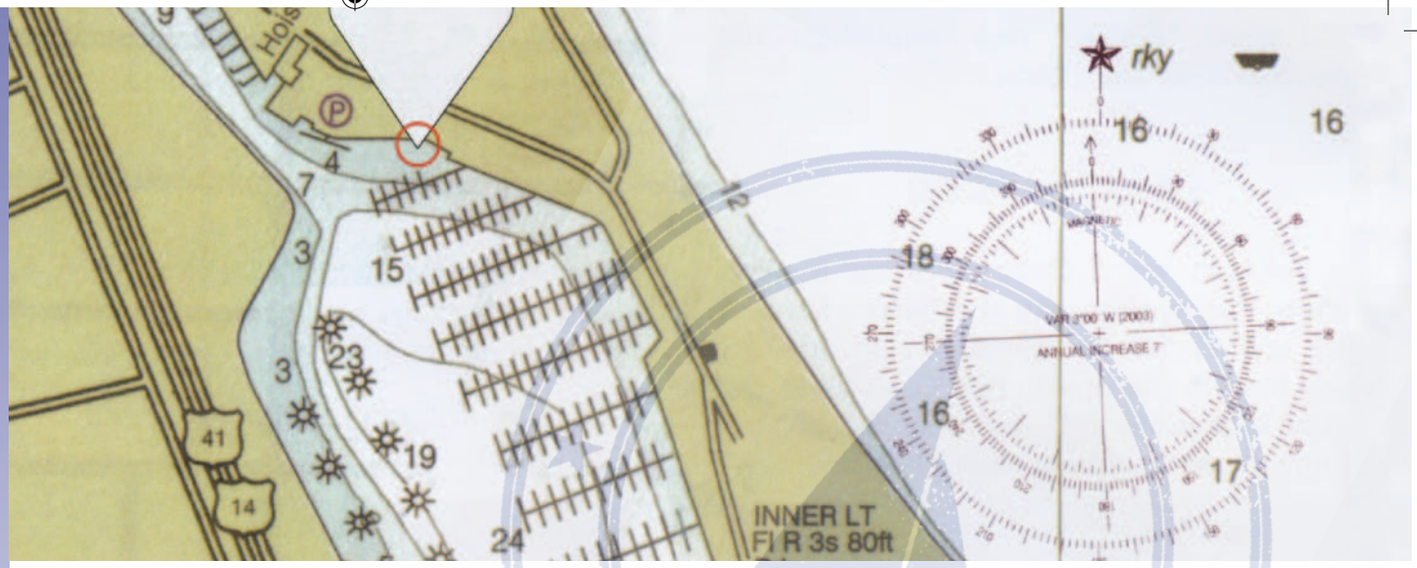
STRATEGIC
*financial advisory services*

# Time to chart your own course?

**It'll be smooth sailing with**

STRATEGIC
*financial advisory services*

# *Create a plan that works for all kinds of weather.*



## *Let us help chart a better course for the short, mid and long-term.*

*Here's how:*

- We ask the right questions to understand past experiences and fears to get your personal and financial plans back on track
- We respond promptly and issue pertinent information
- We're problem solvers – we'll provide advice that is specific to your needs and financial situation
- We're hands-on. Once you're a client you'll never have to fill out paperwork again
- We're independent. Unlike other firms we have "no products to push" and no sales quotas
- We charge a fee for advice – no assets under management

## *We'll show you how to navigate through rough waters and maintain an even keel.*

*The planning process will include:*

- a summary of your goals and objectives
- analyses of current and projected cash flow
- current and projected net worth statements
- investment analysis and recommendations
- retirement income and expense management
- evaluation of all your insurance
- customized diversification/asset allocation
- estate and trust strategies
- on-going reports to re-evaluate your plan and your progress

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