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The Financial Engineering Alliance
on behalf of

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THE FINANCIAL ENGINEERING PEO PROGRAM

for Family Businesses



FAMILY BUSINESS OWNERS

Enjoying success by living life to the max through your ageless passion for your business can create time constraints.

Multi-tasking on the move between your family and your business can take precious time away from dealing effectively with your financial affairs and your dreams.

Obtaining the objectively competent advice required in coping with today's complex financial world can be extremely difficult.

This exclusive concierge services Program was designed with these issues in mind. It comprises an elite team of professionals located across the country.

Our **Coaches** focus on improving your *financial CORE strength™* to achieve your dreams. We engineer your *financial life support system™*, *your business*, in coordination with the surrounding financial, legal and economic environment.



Enhance the *CORE strength™* of your Family Business

- ◆ Clarify your financial objectives and dreams
- ◆ Organize your financial affairs to achieve
- ◆ Reduce your risks of financial loss to protect
- ◆ Enhance financial performance to prevail



FINANCIAL ENGINEERING

- ◆ **FE Business Coaches** drive your dreams by developing financial strategies within your business that provide the flexibility and balance necessary in adjusting to today's constant change.
- ◆ **FE Business Coaches** use their experience, creativity and cutting-edge knowledge to provide tax and legal planning tactics often overlooked.

Financial Product Selection

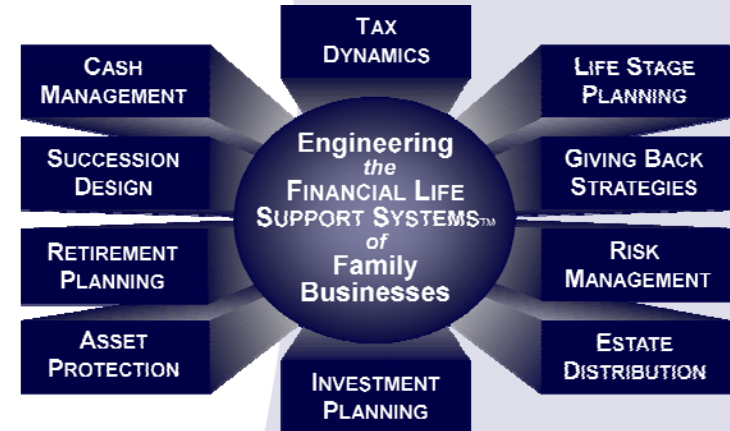
Properly designed insurance and investment products are integrated into your overall financial plan — both personally and within your business.

The Result — *Your Dreams Game Plan*

OpenOption dream architecture™ interfaced with properly designed products and services . . . monitored and refined as needed.

FINANCIAL ENGINEERING BUSINESS COACHES™
An Elite National Team Of Professionals

THE FINANCIAL ENGINEERING PLATFORM *OpenOption Dream Architecture™*



Raise your game

Take a fresh perspective

Use our time-tested, leading edge approach

THE ZEAL OF OUR COACHES — A CUT ABOVE

Each **Coach** takes a forward motion perspective in providing a robust array of financial services and product solutions. These qualifications reflect our passion and dedication:

- ◆ They maintain at least one of the following professional designations: *ChFE, *CLU®, *ChFC®, CFA, CFP®, CPA, PFS, JD, AEP, CEP, CIC
- ◆ They have a minimum of ten years of dynamic financial engineering experience.
- ◆ They adhere to the Financial Engineering Institute's code of ethics.
- ◆ They complete a minimum of twenty hours of innovatively powerful continuing education each year.

INDEPENDENT — EXPERIENCED — COMPETENT — DEDICATED