



BENSON

FINANCIAL GROUP

BUILT ON *TRUST*, DEDICATED TO *SERVICE*

www.bensonfinancialgroup.com



Our teamwork sets BFG apart.

Benson Financial Group is a team of like-minded advisors committed to serving and helping others make wise financial decisions with confidence. As a team of trained specialists, we believe that we bring greater value to people as a group than we otherwise could as individuals.

We are committed to building client-centered relationships...

We teach in a way you can understand.

We make complex financial decisions easy to understand. Because our process focuses on coaching and training first, rather than selling, we help people understand why they are doing what they are doing with their money.

Our independence brings cost-effective and objective guidance.

We are an independently licensed firm. We are not restricted to certain products, strategies, or investment models. Our advisors provide recommendations based on your values-based goals, not on preferred relationships or how we are compensated.

“Built on Trust, Dedicated to Service”

We are committed to doing what we say we are going to do. We have positioned certain members of our team to be solely dedicated to serving our clients and to helping our advisors stay in regular communication with them.





Our “Advance & Protect” Philosophy

No one can predict the performance of the markets or the direction of the economy. But we can predict one thing: The “certainty of uncertainty” will always be connected to the future. So we focus on building your financial plan in a way that will minimize the major risks that can jeopardize your plan:

- Market Volatility Risk
- Interest Rate Risk
- Inflation Risk
- Tax Rate Risk
- Longevity Risk

Establish goals aligned with your values

Our financial advisors who are Behavioral Financial Advisor (BFA™) certified, are specifically trained to help our clients understand what they value most in their current season of life. Once those values are identified, we help our clients develop their financial goals, making sure they are aligned with their values. Confident, integrity-filled decisions are made when they are in alignment with values-based goals.

Analyze your “personal economy”

After goals are aligned with values, it is critical that we spend time understanding your personal economy. Money flows in one of three directions at all times – you are either saving it, spending it (your regular monthly lifestyle), or losing control of it, in many cases unnecessarily or unknowingly. One of our first priorities, before we ever make any recommendations on where or how to save your money, is to see if we can help you discover some needed changes with your personal economy. Small shifts in thinking and cash flow direction can enhance your ability to retain and utilize more of your hard-earned money that is currently leaving your control.

Enhance tax diversification of your assets

Every dollar of taxes saved is one more dollar you can save or spend in the future. We will coach you as to how to create a greater balance among taxable, tax-deferred, and tax-free assets in order to more efficiently utilize your money in the future.

Build your distribution plan

Whether experiencing a time of uncertainty or prosperity, there will always be a smart place to get your money when you need it. We frequently utilize a bucketed investment approach based on your time horizon and risk tolerance, with the goal being to protect the different purposes of your money. The following are examples of typical “bucket” goals:

- | | |
|-------------------------|----------|
| • Safety | • Legacy |
| • Liquidity | • Income |
| • Preservation | • Growth |
| • “Big Ticket” expenses | |

Please note: Safety/Preservation is positioned as an investment goal. Investing in certain securities may help to hedge against certain risk, but does not imply any guarantee from loss.

“Whatever you do, work at it with all your heart, as working for the Lord and not for men, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving.”

—Colossians 3: 23-24

Integrated Financial Resources Network

Benson Financial Group provides a large range of services in the areas of



Financial Planning Strategies

RETIREMENT • INCOME • LEGACY • BUSINESS



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