



**BFG**  
Financial Advisors

*A division of Brotman Financial Group, Inc.*

# LEGACY CLIENT PROGRAM

## What is the BFG Legacy Client Program?

In keeping with our firm's core vision to develop clear, custom plans that strive to build lasting financial independence for our clients and their families, the BFG Legacy Client Program was designed to serve multiple generations of each client family.

We aim to identify multi-generational planning opportunities to provide a collaborative environment to work effectively with your parents or grown children. The program creates a more seamless way to engage in the sometimes difficult conversations about personal finances. It also allows loved ones to gain guidance that comes from access to Certified Financial Planner<sup>TM</sup> practitioners who already have a relationship with your family and know about your individual and collective financial history.

## How does the BFG Legacy Client Program work?

Unlike many financial planning and wealth management firms, at BFG Financial Advisors we do not have an asset minimum to engage our services. Instead, we use a flat engagement fee and an annual retainer fee (currently \$6,500). The BFG Legacy Client Program allows immediate family members to gain access to all of the planning services at BFG for only \$3,250.

As long as one generation of your family is paying our standard annual fee, or maintains at least \$650,000 in assets under BFG's management, all other generations will qualify for the BFG Legacy Client Program.

## How can you get started with the BFG Legacy Client Program?

All you need to do is make an introduction to your parents or grown children, and we'll explain the process and start the engagement with them directly. Some of our clients find that the best way to engage their parents or grown children is to make the initial financial planning process a gift to them. If you'd prefer to make this a gift, we can bill you when your family members engage.

Our multi-generational approach creates a clear and defined plan for your entire family. If you would like more information about the BFG Legacy Client Program, please contact us anytime to discuss the process in greater detail.

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