



**BFG**  
Financial Advisors

A division of Brotman Financial Group, Inc.

# Legacy Client PROGRAM

## What is the BFG Legacy Client Program?

The BFG Legacy Client Program provides a collaborative environment for your family and creates a more seamless way to engage in the sometimes difficult conversations about personal finances. The program invites your immediate family members to engage our services in an affordable way, weaving your separate plans together where appropriate in order to create opportunities for multi-generational family planning.

The program also allows loved ones to gain the guidance that comes from access to CERTIFIED FINANCIAL PLANNER™ 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, we do not have an asset minimum to engage our services. Instead, we use a flat engagement fee and annual retainer fees to provide ongoing planning. The BFG Legacy Client Program allows family members to gain access to our services for only half of the normal cost.

As long as one generation of your family is a current Private Wealth Management client of BFG, other family members will qualify for the BFG Legacy Client Program.

## How can you get started?

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 like to make this a gift, we can bill you when your family members engage.

If you would like more information about the BFG Legacy Client Program, please contact Amanda Pancake at [apancake@bfgfa.com](mailto:apancake@bfgfa.com) or 410-252-4555 x224.



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