



Skygate

FINANCIAL GROUP

Your Partner In True Wealth Management



Independent
Registered
Accountable

The Skygate Difference

REGISTERED

Skygate Financial Group is an independent Registered Investment Advisor (RIA). This means we have a fiduciary duty to act in the best interest of our clients. Brokers, who often receive incentives for selling clients particular financial products, are not held to this standard.

COMPREHENSIVE

We tailor our advice based on our clients' goals and needs. In addition to managing investments, we offer comprehensive financial planning services which include: tax planning, retirement planning, education planning, risk management and insurance, estate planning and charitable giving. We call this approach **True Wealth Management**.



TRANSPARENT

Our clients receive clear communication regarding our advisory fees and transactions related to their investment portfolio.

ACCESSIBLE

Established, trusting relationships between our advisors and clients is the cornerstone of our business. If a client has a need or concern, our advisory team is available and ready to help. In addition, our clients have access to their accounts 24/7.

NO PRODUCT SALES. NO COMMISIONS.

We are compensated solely by client fees. This is an important distinction from working with a broker, who may receive undisclosed commissions or “kick-backs” for selling a specific financial product that may not be in the client’s best interest.

What Keeps You Up at Night?

Are your finances keeping you up at night? If so, you're not alone. A poll by the National Foundation for Credit Counseling (NFCC) showed that 79% of respondents said their personal finances kept them awake at night.¹



The problem

Many people are unsure how to make wise decisions related to their personal finances such as investments, retirement, taxes, insurance and education. Any one of these topics *alone* can be stressful to understand, let alone change. What often happens is well-intentioned people become so overwhelmed by the complexity of their finances that they end up doing nothing. That can be a costly mistake.

What can you do about it?

If you are ready to make better decisions about your finances – and want to have an objective, comprehensive evaluation that looks at your *entire* financial picture – you need to ask for help from someone you can trust.

How we can help

- Skygate Financial Group is an independent Registered Investment Advisor (RIA) – this means we have a *fiduciary duty* to act in the best interest of our clients.
- We *tailor* our advice based on your goals and needs.
- We look at your *whole* financial picture.
- We *do not* sell products.
- We provide *transparency* – no hidden agendas, fees or conflicts of interest.

We help you manage your finances, so you can manage the *rest*.



Second Opinion Service



NO COST.
NO COMMITMENT.
NO PRODUCT SALES PITCH.

Is your financial health in tip top shape? If you're unsure or have questions, perhaps it's time for a checkup. *We can help.*

At Skygate Financial Group, we offer advice that is both objective and personalized. We are proud to be an independent Registered Investment Advisor (RIA). As an RIA, we have a fiduciary duty to act in the best interest of our clients.

Our Second Opinion Service no-cost consultation concludes in one of three ways:

1. We may recommend you stay on the same path. If we feel you're in good shape with your current advisor, *we will tell you.*
2. We may recommend that you consider becoming a Skygate Financial Group **True Wealth Management** client.
3. We may refer you to other advisors if it is recommended that you move from your current advisor and Skygate is not the best fit.

Ready to get started? Contact us today if you or someone you know could benefit from a second opinion.

Getting Started

We would love to discuss your goals and to answer any questions you may have about our services. To speak with a Skygate Financial Group advisor, please contact us today.



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