

FOCUS ON THE MOMENTS. NOT THE MONEY.



DEERFIELD  
Financial Advisors, Inc.

PLAN FOR LIFE'S MOMENTS, SO YOU CAN...



### RETIREMENT PLANNING

We will help you develop a plan to prepare and transition into retirement. We want you to feel confident you can reach your goals and enjoy retirement freely.



### INVESTMENT MANAGEMENT

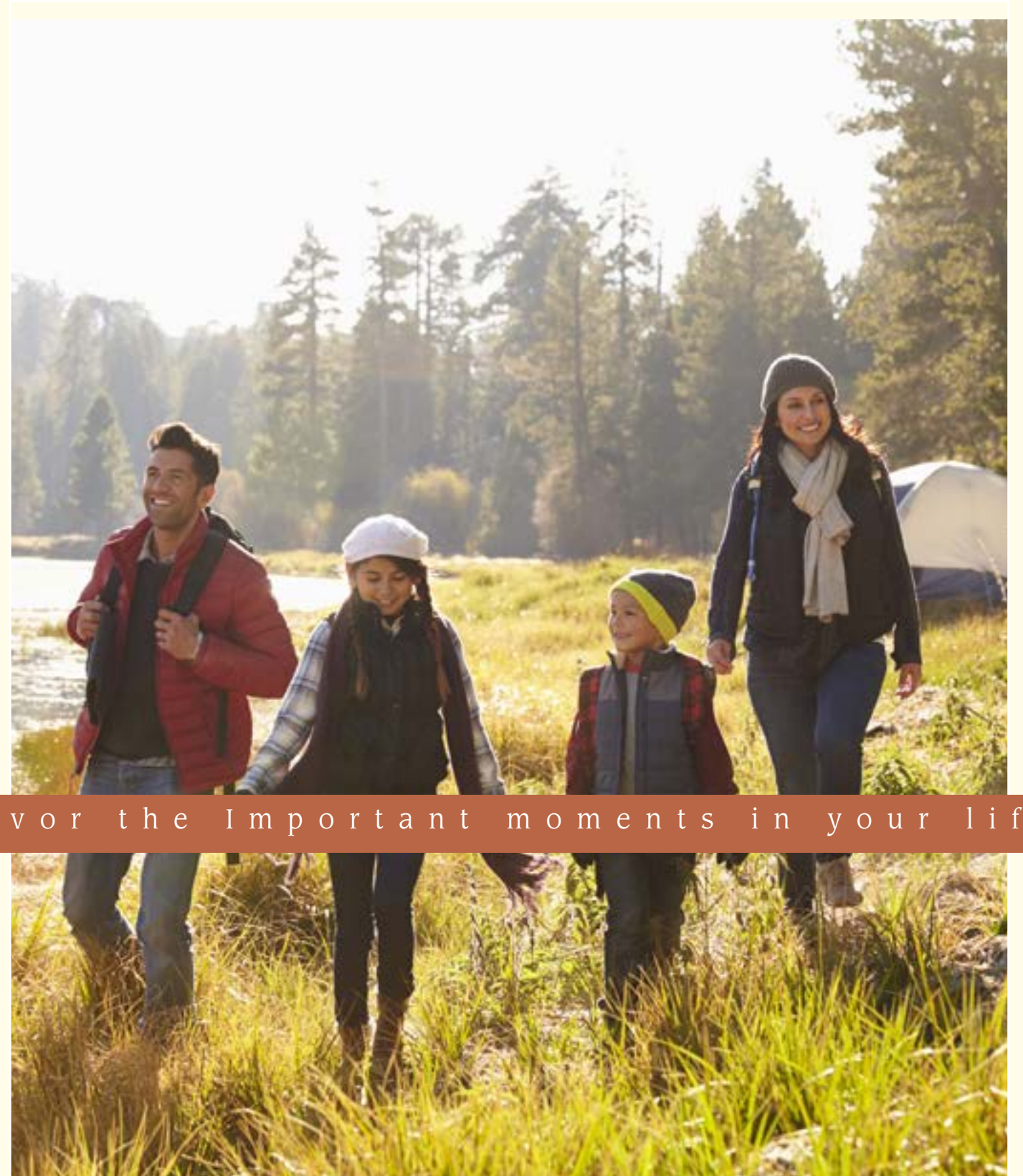
We will help you learn and implement an evidenced-based approach to investing, so your money can be working towards your goals for you.



### ESTATE AND TAX PLANNING

Whether you are planning for the unexpected or encountering the complex tax code, we will work with you and other professionals so that the comprehensive plan you put in place aligns with your goals and plans.

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Financial advice aimed at allowing you to savor the Important moments in your life.

### DISCOVER

*We will meet to learn about you and your entire financial picture before making any recommendations.*

### 3 STEPS TO FINANCIAL CLARITY

### PLAN

*After we are comfortable that we understand the things that matter to you, we will be able to provide you with a customized plan that addresses those unique goals.*

### MAINTAIN

*We know that the need for clarity does not end after our initial meetings. We will continue to work with you on an ongoing basis so you feel prepared for life's moments.*

*Everybody has moments in life  
that bring about financial uncertainty,  
such as a job change, retirement, college planning,  
or just general market volatility.  
Our goal is to provide clarity and financial  
direction so that you can focus on the moments  
that matter and not the money.*

**DEERFIELD**  
Financial Advisors, Inc.

We serve clients in 26 states from our offices in Indianapolis, Indiana and Park Ridge, Illinois. If you are feeling anxious about your financial situation or seeking advice to help you reach your goals, contact us today. You deserve to have peace of mind about your finances so you can spend more time focusing on the things that truly matter to you and your family.

*Contact us at either of our locations, or at [www.deerfieldfa.com](http://www.deerfieldfa.com)*

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