



Enter the Best of Both Worlds!

Capital Financial Planning^{CL}

A Registered Investment Advisor

www.capitalfinancialplanning.net

6 Tower Place | Albany, NY 12203





Hybrid RIA Opportunities!

6 Tower Place | Albany, NY 12203 | (518) 867-4000 | Fax (518) 867-4005

www.capitalfinancialplanning.net | todd@4cfp.net

Dear _____:

At Capital Financial Planning, opportunity awaits as our hybrid RIA platform provides you and your clients with the flexibility of choice. You are able to run your practice your way, without quotas or minimums. Our turnkey, upscale group location takes the stress and expense of running an office off your plate, so that you may focus on what you do best: working with your clients. While you are independent, you are never alone, with our approachable, proactive management readily available to you.

We offer a soft place to land for those advisors looking for new opportunities, as well as for advisors in need of a succession plan as retirement approaches. Either way, we seek to maximize the value of your practice and help you to enhance your service to your clients

Imagine the possibilities:.

- Fully furnished office space with beautifully appointed conference rooms – or, you may choose your own office location and still enjoy our many services
- Dedicated reception and welcoming hospitality
- Hybrid RIA platform supporting brokerage and advisory business
- Highly competitive payout structure
- In-house fixed insurance general agency with no-split case design service
- Friendly, congenial atmosphere with opportunities for collaboration and mentorship
- High speed internet, business machinery, cable televisions, and gratis long-distance calling
- Complimentary business writing services
- Capital Financial Planning Charitable Foundation matching gifts and grant program

Our advisors aren't charged for each cup of coffee they drink, fax they send, or photocopy they make. We don't believe in charging you by the square foot for your office either. We believe in providing an environment conducive to helping you assist your clients toward their investment goals and objectives.

To learn more, please contact me in confidence at **518-867-4000 x105** or todd@4cfp.net, or mail back the card in the enclosed postage-paid envelope. We are different, and it shows. Let us demonstrate our value proposition and why we were voted a Best Place to Work for seven consecutive years.

I look forward to our conversation,

Todd

Todd Slingerland, OSJ
Securities offered through LPL Financial, Member FINRA/SIPC

ENJOY THE BEST OF BOTH WORLDS AT CAPITAL FINANCIAL PLANNING

Name _____

Street _____

City, State, Zip _____

Personal email _____

Phone _____

Preferred method of contact _____

6 Tower Place | Albany, NY 12203 | (518) 867-4000 | Fax (518) 867-4005
www.capitalfinancialplanning.net | todd@4cfp.net

AREAS OF INTEREST:

- _____ Hybrid RIA
- _____ Fixed Insurance General Agency
- _____ Office Space
- _____ Business Succession Planning
- _____ Other (please specify) _____



A Registered Investment Advisor