



Building Lifelong Relationships through Trustworthy, Independent Guidance

CFG Wealth Management advisors deliver a level of attention and service not often found in today's marketplace.

Before investing a dime, investors need to know where their money is going, who is going to be managing it, and how they're going to recreate their paycheck to maintain their lifestyle in retirement. For investors who choose CFG Wealth Management, those questions—and many others—are answered openly and honestly at the very onset of every relationship.

“We sit down with clients individually and do a comprehensive, 35-page retirement planning review and a proprietary 401(k) analysis to assess where they

are currently and where they need to be for retirement,” says Founder and Managing Partner J. Graydon Coghlan, who left the wire house world 15 years ago to found CFG Wealth Management's network, which currently includes seven advisors.

His vision was to offer a more customized investing model for his clients, many of whom are employees of large, multinational corporations. “Through company-specific workshops and one-on-one meetings, we educate clients about all their options so that they feel more secure about the choices they make,” he says.

◆ Independent and Objective

As financial advisors for Securities America Advisors, Inc., a fee-based firm, advisors are primarily compensated by the performance and balances of their clients' portfolios. “We have skin in the game,” Coghlan explains.

Because the firm is independent, advisors aren't limited to proprietary products; they have the flexibility to search the entire investment universe for strategies that best suit clients' needs. All investment research, due diligence, asset selection, and review is

The team: (l to r) Tyler Alexander, Connor Bush, Sklyer Atkinson, Josh Willard, Drew Lewis Stewart, Graydon Coghlan, Bryce Alvri, Shirley Coghlan, Melissa Snook, Kaitlyn Cardenas

conducted in-house by the firm's investment management team, which helps provide the foundation for the unbiased independence and objectivity advisors strive to achieve.

“We have the freedom to create unbiased portfolios that reflect each client's goals,” says Coghlan. “Our clients are generally seeking protection on the downside and a fair rate of return on the upside.”

◆ Growth Factors

When a business flourishes, it's the direct result of satisfied clients. Such has been the case with CFG Wealth Management, which has doubled in size in recent years and has quickly become a top-ranked advisory firm of Securities America Advisors, Inc.*, one of the largest independent broker-dealers in the country.

A big part of the firm's growth is due to referrals from clients.

“Often we give our time and advice to investors who aren't even clients yet,” Coghlan says. “Our mission is to create long-term relationships, and building a foundation of trust is key.”

The CFG Wealth Management branch office is located in San Diego, with offices throughout California. For more information, call 800-884-5121 or visit cfgwmt.com.

CFG
Wealth Management
Trusted Advisors

*Ranked sixth out of 1,336 advisors with Securities America Advisors, Inc.

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