

# Strategic Financial Solutions

- ● ● ● ● FOR PUBLIC & PRIVATE COMPANIES, BUSINESS OWNERS AND CORPORATE EXECUTIVES

*Gaynes Financial Services is proud to partner with American Financial Network (AFN) to provide strategic financial solutions for both individual and corporate clients, Combining the deep resources of these two accomplished planning firms, together our advisors deliver highly customized financial advice, unparalleled service & support, and a caring dedicated team of financial service providers.*

## **Who We Serve**

**Individual Clients, in addition to Private or Public Middle Market companies in the United States.**

**Ideal Individual Client Profile:** We specialize working with Business Owners and C-Level Executives.

*Our team of professionals service individual clients at every level with no income or investment minimums. **Ideal***

**Corporate Client Profile:** Profitable Middle Market Companies with revenues from \$5M to \$500M+

## **What We Do**

### **I. Financial Planning**

- Goals driven comprehensive custom Financial Plans (cash flow analysis, tax, retirement, education, risk management, estate, allocation design)
- Financial Planning can be offered as a company benefit through our Executive Financial Planning Program which also offers 3rd party independent advisors for tax preparation, legal, real estate, banking, and executive coaching among others

### **II. Asset Management**

- Specialization in asset allocation and portfolio design
- Investment implementation and management
- Separately Managed Accounts
- Structured Products: PPVUL, among others
- Direct Participation Programs (Real Estate, Oil & Gas, Managed Futures)

### **III. Risk Management**

- Individual Life and Disability Insurance, Long-Term Care, Estate Insurances, (term, permanent, premium finance)
- Corporate insurances- COLI, Group Life-Section 79, Premium Finance, PPVUL, Keyman, Buy/Sell, Stock Repurchase
- Self Insurance Strategies and Programs including Captive Insurance Companies

### **IV. Corporate Compensation & Benefit Services**

- Benefit Review and Consulting Services including Plan Design and Implementation
- Executive Compensation & Benefits
- Qualified & Non Qualified Plans
- Entity Planning
- Business Continuation Planning

### **V. Financial Solutions Alliance (FSA)**

- The FSA is a network of best-in-class professional service providers who come together to cross-serve corporate and individual clients nationally, regionally and locally.

## **Securities America, Inc.—Over 1800 Representatives Nationwide**

David Gaynes and the professionals with Gaynes Financial Services offer financial planning and advisory services through Securities America Advisors, Inc., an SEC Registered Investment Advisor, and are registered representatives offering securities through Securities America Inc., a Registered Broker/Dealer, Member FINRA/SIPC. Gaynes Financial Services, American Financial Network and Securities America are unaffiliated.

As a Securities America Advisor Representative, David Gaynes, CFP® ChFC, CFS must meet the utmost standards in an already tightly regulated industry and has extensive corporate benefit planning experience in addition to advanced individual planning experience that meets the specific needs of today's corporate executives and high net-worth clients.

Contact Info:  
[www.DavidGaynes.com](http://www.DavidGaynes.com)

David H. Gaynes, CFP®, ChFC, CFS  
600 Embassy Row, Suite 400 Atlanta, Georgia 30328  
(770) 353-6350 (770) 353-6338 | [dgaynes@intfingroup.com](mailto:dgaynes@intfingroup.com)

**GAYNES**