Benefit Financial Services Group

charles SCHWAB INTELLIGENT PORTFOLIOS

Wealth Accumulator

Program Highlights

- Online profile questionnaire to provide insight into your risk tolerance and capacity to help determine your proper investment strategy
- Low cost, globally diversified investment portfolios built on the same philosophy as the firm's custom asset allocation models available to our institutional clients
- No account service fees, trading commissions, or custody fees are charged by the custodian
- Automated investment engine through which accounts are automatically rebalanced
- View real-time balances, performance, historical charts, and run reports for all of your Wealth Accumulator accounts in one place with our Client Portal and through access to the Charles Schwab & Co., Inc. ("Schwab") website and mobile app
- Quarterly Newsletters including current topics on the markets, financial planning, and investing

Clients First

Benefit Financial Services Group ("BFSG") has been in business as an investment adviser for more than 20 years. Through its Institutional Services and Wealth Management divisions, BFSG is committed to providing the highest quality, state-of-the-art corporate retirement plan consulting and individual wealth management services to our clients. BFSG's culture is to always put the clients' interest first. We are interested in obtaining a clear understanding of what is important to each client so that we can be effective in achieving goals and needs.

Accessible

We take pride in meeting client needs in a timely and professional manner. We can be reached by phone, email, or mail to answer questions regarding client accounts and investments.

BFSG clients have 24/7 online access to view real-time account balances and performance. As assets grow, BFSG offers both digital and in-person portfolio reviews to help assess investment performance, adjust financial goals and targets, and answer questions

Transparent

In our relationship with each client, everything is transparent. We strive to always align our interests with our clients, therefore we adhere to a strict fee-for-service model in both the institutional and wealth management divisions. We do not sell any products, nor do we receive any compensation from any source other than our clients. Honesty, integrity, transparency and excellence comprise our core principles.

Scan the QR Code to the left to be taken to the enrollment page on your phone or tablet.
Program Key = YQKX

Office 949-955-3031 | Fax 949-955-2553 | Visit us at www.bfsg.com | 2040 Main Street Suite 720, Irvine CA 92614