

Brokerage Services

Professional Service Makes CFAL Your Brokerage Choice

CFAL provides a comprehensive array of investment products and services to domestic and international investors. Our combination of competitive rates and outstanding professional service set us apart from other brokerage firms.

CFAL guides its clients through the fast paced world of investments ensuring that the client get the most for their investment dollar with professional investment management of you're their money in real estate, securities, commodities, utilities and other related investments.

Brokerage Services

In our ever changing market environment individuals often need qualified investment advice to ensure the preservation and growth of their assets. Our Standard Brokerage account puts the client at the core of managing their investments and facilitates specific investing and trading instructions with CFAL as their guide. Brokerage clients will receive online statement access, market updates and quarterly portfolio appraisals that include activity summaries, as well as specific investment holdings and transaction history.

Investment Management Account

This holding account is actively managed by a CFAL investment professional who provides advice and will manage the client's investments based upon agreed trading constraints. This type of account generally requires a minimum of \$50,000 worth of assets under management because of the level of service and higher fees associated with this type of account. The CFAL personal Investment Advisor monitors portfolio performance and will provide detailed quarterly analyses.

Benefits

- Ease of trading: No more transfer forms or signature guarantees Just give us your instructions and we effect the trade.

- Access to Information: Our analysts follow the market and constantly track company values as well as economic data to assist in making your investment choices
- Client communications — Weekly Market Update, Quarterly Newsletter, Company Valuations and Recommendations.
- Client Service – Online Account Access, Financial and Retirement Planning, Primary Client Relationship Officer, and Reduced Cost and Paperwork on Local Trades
- Monthly cash balances, including dividends, interest and proceeds from sales can be automatically invested into a money market mutual fund earning an attractive, competitive interest rate.