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## Private Wealth Services

### Manage your investment portfolio

You have meaningful goals. Our professionals can help you reach them. For more than 20 years, has served the needs of individuals and institutions—to deliver an array of personalized services and solutions that help build, preserve and manage wealth.

In our ever changing market environment individuals often need qualified guidance for their investments. CFAL provides a comprehensive array of investment products and services to domestic and international investors. Our combination of competitive fees and outstanding professional service sets us apart from other firms. CFAL offers an array of services including to purchase and sale of securities, trading and market insight, payments and transfers, cash management and custodial services. Our Private Wealth Services puts our individual and institutional clients at the center of managing their investments and facilitates specific investing and trading instructions with the unique expertise of CFAL as their guide. We know that every individual and organization has different needs, so we work closely with our clients to develop customized solutions that draw on our expertise. Our Advisory Option allows us to monitor your portfolio and provide customized and professional analysis and solutions for your holdings in real estate, securities, commodities, utilities and other related investments.

### Our Benefits

#### Ease of trading:

No paperwork. Just give us your instructions and we can place the trade for your account.

#### 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

**Investment Insight:**

Weekly Market Update, Quarterly Newsletter, Company Valuations and Recommendations.

**Automatic Cash Sweep Option:**

Monthly cash balances, including dividends, interest and proceeds from sales can be automatically invested into a money market mutual fund earning an attractive, competitive returns.

**Single Point of Contact:**

A dedicated primary relationship officer who is fully responsible for your services and satisfaction – and evaluated accordingly.

**Unparalleled Client Service:**

Easy-going, enjoyable relationships, reflected in our proven professionals and unrivaled client loyalty.

## Access to Local Investment Options:

- Local Stocks
- Corporate and Government Bonds
- [The CFAL Family of Mutual Funds](#)
- Automatic Cash Sweep Option
- Access to Private Deals

