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# WEALTH STRATEGIES FOR THE **DISCERNING INVESTOR**

We hold ourselves to a higher standard in our mission to deliver unparalleled service to the discerning investor who is seeking more from their financial partner.

**M | F | A**

ASSET MANAGEMENT



## What Sets Us Apart

There is no single path to wealth – at MFA Asset Management we understand that and take great care in delivering personalized, thoughtful financial strategies for our clients, each of whom is unique in experience and aspirations. We are proud to work with individuals, families, corporate institutions and their retirement plan participants in need of financial guidance. Below are few of the reasons we are confident MFA Asset Management is the firm you have been searching for to help you build, preserve and manage your wealth.

### **DEDICATED, MULTI-DISCIPLINARY TEAM.**

At MFA Asset Management, we believe that a broad range of knowledge and experience is necessary to truly help an investor understand the risks and potential rewards involved with accumulating and preserving assets. Whether it be working with individual investors or partnering with corporate institutions to design and manage their retirement plans, we surround each with a dedicated, multi-disciplinary team consisting of advisors who hold the Chartered Financial Analyst® designation, as well as those who are Certified Public Accountants (CPA) with Masters in Taxation (MST), Accredited Investment Fiduciaries (AIF®), Certified Financial Planners (CFP®), Registered Life Planners (RLP®), Personal Financial Specialists (PFS), Chartered Retirement Plans Specialists (CRPS®) and Certified 401(k) Professionals (C(k)P®)

### **CONFLICT-FREE CLIENT ADVOCACY.**

We are an independent, fee-only, SEC-registered investment advisory firm that puts our clients' interests first. Our investment selections are un-biased as we receive no commission or other financial benefit from the selection of specific investments utilized. We do not custody client assets and our only fees come from our clients—we work for you, and only you

### **PERSONAL, VALUE-DRIVEN APPROACH.**

We take pride in working closely with our clients and providing them with customized investment solutions to meet their specific objectives. We prioritize a responsive, value-driven, hands-on approach that allows us to establish productive relationships and generate measurable results that mitigate market surprises, meet individual objectives and deliver competitive returns

### **TAX PLANNING—CENTRAL TO OUR WEALTH MANAGEMENT SERVICES.**

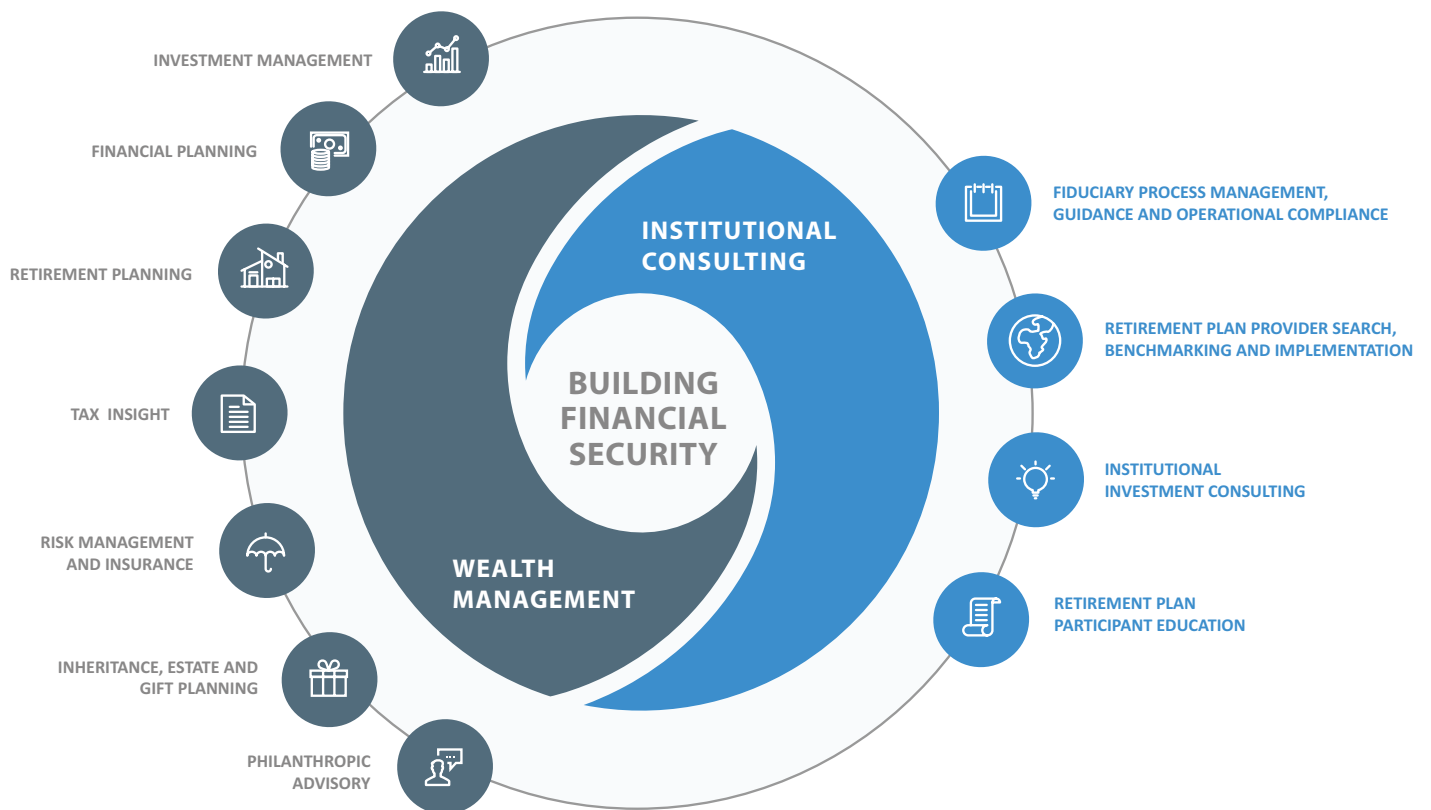
Income taxes often represent one of the largest expenditures an individual or family faces each year. With proactive guidance, however, this cost can often be mitigated. Therefore, tax planning is central to everything we do. Not only is the MFA Asset Management team comprised of CPAs with advanced degrees in Taxation, but we are also affiliated with an accomplished CPA firm, MFA – Moody, Famiglietti and Andronico, that is fully versed in the subtle nuances of sophisticated tax planning

### **OPERATIONAL COMPLIANCE—A UNIQUE VALUE-ADD.**

As a plan sponsor, our clients have significant personal fiduciary responsibility under the Employee Retirement Income Security Act of 1974 (ERISA). ERISA requires they act with the skill, knowledge and expertise of a prudent expert and ensure every decision they make as a plan fiduciary is in the best interests of plan participants and their beneficiaries. Our advisory services go above and beyond those offered by other retirement plan advisors to not only provide fiduciary process management advice but also essential guidance for ensuring compliance. Our unique operational compliance audit services assist plan sponsors in mitigating the risk of operational compliance failure and “common deficiencies”

# Working With Us

Whether you are a business working to meet your investment planning and fiduciary responsibilities, an individual saving for retirement or an investor seeking all the elements of a sustainable financial plan, MFA Asset Management offers a broad suite of services to assist you in building, preserving and managing your wealth.





CONTACT US

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