



Welcome to Potomac Advisory Group. Our goal is to help you live the one life you have the best you can.

## Welcome

Dear Client,

On behalf of Potomac Advisory Group, welcome to our network of valued clients. We are delighted that you have chosen us to help you pursue the financial future you envision. Here is some information outlining the services we offer and what you can expect throughout this journey.

Potomac Advisory Group is a full-service accounting, tax and financial services provider committed to helping individuals, families and small businesses succeed financially. We offer creative, customized solutions. See the attached Menu of Services for a complete listing.

In addition, we have access to an abundance of resources through one of the top broker/dealers in the industry<sup>1</sup>, Avantax Investment Services<sup>SM</sup>, but the independence to control our culture and values. And what we value most is *you*. Our client-centric focus ensures that our advice supports your vision and our service exceeds your expectations. Along with fair and honest counsel, we believe in the confidentiality of your personal information and the transparency of our fees and services.

We delve deeper into the financial process, we ask for your cooperation in maintaining our trusting relationship by us with disclosure of your financial situation, as applicable, and informing us promptly as changes arise. This will aid us in our quest to help you pursue your goals successfully. If you know anyone who could benefit from any of our services, please feel free to pass along our information.

We look forward to working with you. If you have any questions about our company or the services we offer, please contact our office by phone at (202) 559-5592 by email at [info@potomacadvisorygroup.com](mailto:info@potomacadvisorygroup.com). We have also included maps of our locations in this packet.

<sup>1</sup>Independent Broker-Dealers 2013, *Financial Advisor Magazine*, 2013

Investment services are offered by Kevin O'Reilly through their affiliation with Avantax.

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# Menu of Services

## TAX & ACCOUNTING

- Business, Individual, Estate, & Trust Taxes
- Payroll, Sales Tax, Reporting, & Accounting
- Tax Planning and Consultation
- IRS/State Tax Authority Representation
- Certified Acceptance Agents
- Real Estate 1031 Exchange & Investment Analysis



## PLANNING SERVICES

- Tax Planning & Consultation
- Retirement, Education, & Legacy Planning
- Cash Flow Analysis & Budget Forecasting
- Risk Management
- Business Plans & Succession Planning
- Small Business Loans

## INSURANCE

- Fixed & Variable Annuities\*
- Life, Health, Vision, Dental Disability & Long Term Care
- Workers Compensation
- Key Man Insurance

## INVESTMENTS\*

- Individual Retirement Account
- Loans
- 401K, SEP, SIMPLE, ESOP, & 403B, & profit sharing plans
- Mutual Funds & Annuities\*
- College 529 Plans
- Wealth Management

\*Securities offered through Avantax Investment Services<sup>SM</sup>, Member SIPC, Advisory Services offered through Avantax Advisory Services<sup>SM</sup>, 6333 N. State Highway 161, Fourth Floor, Irving TX 75038 (972) 870-6000.



## USE YOUR COMPASS

Situations where you might need advice:

- New job or career change
- Before receiving retirement money
- Buy/sell a home or rental
- Receipt of inheritance
- Redemption of more than \$2,000 in stocks, bonds or mutual funds
- Start, sell, or close a business
- Giving or receiving more than \$15,000
- Retirement or receipt of Social Security
- Anytime your investment horizon changes
- New child or adoption
- Have a change in marital status
- Receive a notice from the IRS or state taxing authority
- Any situation where you simply want a second opinion

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**Potomac Advisory Group**

**Your Financial Compass**

**(202) 559-5592**

**Bethesda – DC - Arlington - Frederick**

**[potomacadvisorygroup.com](http://potomacadvisorygroup.com)**