



Your Investment Account

- Profectus Financial Partners (PFP) This is our company. We do not hold your assets nor manufacture any products. PFP's interest is to provide solutions in the best interest of our clients and is not restricted to any specific insurance or investment company.
- The Bulfinch Group PFP is affiliated with The Bulfinch Group, which is a general agency of The Guardian.
- Park Avenue Securities (PAS) PAS is a hybrid broker/dealer and RIA. All compliance functions and compensation to your advisor comes through Park Avenue Securities.
- Pershing A division of Bank New York Mellon, Pershing is one of the industry's leading custodians. They are responsible for holding your assets, providing performance reporting, and tax reporting.
- Wealth Managers PFP has access to over 100 leading investment management firms through Pershing. Your manager, and thus your investments, were chosen based on your goals and objectives and based upon your individual risk tolerance and time horizon.

Profectus Financial Partners offers fee-based planning, wealth advisory services, and securities through Park Avenue Securities LLC (PAS) and insurance through The Bulfinch Group Insurance Agency, LLC. Fee-based plans may include tax and wealth planning suggestions, but we do not give tax or legal advice. You should consult your tax or legal advisor regarding your individual situation. Darren Violette is an Investment Advisor and Registered Representative of PAS and Financial Representative of The Guardian Life Insurance Company of America (Guardian), supervised from: 160 Gould Street, Suite 310, Needham, MA 02494, <u>781-449-4402</u>. PAS is a wholly-owned subsidiary of Guardian. Profectus Financial Partners and The Bulfinch Group are affiliated, but neither firm is an affiliate or subsidiary of PAS or Guardian. Darren Violette, CA Insurance license # OM18222; FL Insurance license # P171418. PAS is a member FINRA, SIPC. 2022-134909 Exp 3/24