



THINK
WIN, WIN, WIN

(903) 533-8585
WWW.FELICIANOFINANCIAL.COM

The Set-Up

These days, your business and management team have more challenges than ever to succeed. Reaching higher not only means planning, but planning well. If you want to take your business and your team to the next level, you need a partner you can trust to guide you around the pitfalls, a professional to point you in the right direction.

You need a partner like Feliciano Financial Group.

Founded in 1983, Feliciano Financial is an independent firm of employee benefits specialists and professional financial advisors based in East Texas. Working together with employers, business owners, executives and professionals, our focus is to inspire and motivate our clients to implement a win, win, win program and then to build around that.

We offer our clients a broad range of products and integrated planning services. Our services include: Employee Benefits Planning, Group Retirement & Pension Planning, Business Consulting, Succession Planning, Executive Financial Planning and more.



Employee Benefits

*Inspiring employers and employees to
'Win, Win, Win!'*

Our mission: To inspire and motivate employers to think 'Win, Win, Win' for their employee benefits programs.

When you began your employee benefits program it was likely done to increase employee retention, provide protection and/or retirement savings for their families and to show employees you were committed to their well-being. It was an investment in your future together. But over the years your benefits program may have turned into an expense - a seemingly uncontrollable cost that is expected, not necessarily valued, by employees. We call this a lose-lose proposition. Every year, as rates go up and benefits decrease, employees are becoming less loyal, less productive and more disgruntled.

It doesn't need to be this way.

Our focus is helping employers and employees become accountable for their benefits programs. Working together we will establish an employee benefits game plan focused on cost containment and valued benefits. We are able to do this through efficient plan design utilizing our **Bidright** and **Educateright** programs.

Together, we can turn this lose-lose proposition into a 'Win-Win-Win' game plan!

Employees will soon begin to take pride in their benefits program when they feel they have a winning program, one they have some control over. The most obvious results will be increased employee morale, lower turnover and increased productivity.

Our 'Win, Win, Win' promise is simply this: happy, productive employees will help make your company more successful. And successful companies help build successful communities, a place we can all be proud to live in.





Give your employees the gift of a lifetime, a Group Retirement Plan.

A solid Group Retirement Plan is one of the smartest investments you can make for your business. For your employees, it's an attractive part of your overall compensation package and it sends a clear message that you care about them. For you, it's an opportunity to attract, retain and support the people who contribute so much to your success.

Like any other business decision, your Group Retirement Plan must be based on sound advice. You need to consider state and federal legislation, your company's goals and corporate culture, and employee expectations. Feliciano Financial will help you balance those priorities as you strategize on the right plan for your business.



Our experienced consultants will assist you in developing the right plan and will help you find the best carrier to ensure the best possible value for your employees. We will also educate plan members on the wide variety of financial planning issues and investment options so they can make informed decisions regarding their retirement plans. While most Group Retirement Plans stop at the company level, Feliciano Financial is committed to both the company and individual plan members. Educational resources, planning tools and counsel are made available to all plan members.

We believe that retirement is a beginning, not an end.

We believe that retirement is a beginning, not an end. Accordingly, our professional financial planners are available to work with your employees as they make the transition from work to retirement. We can help them maximize their retirement plan so they can get the most out of life in retirement.



Integrated Planning

...is about offering expertise and value to the diverse needs of businesses and individuals alike.

Feliciano Financial is a full service financial consulting firm. When you partner with us, you partner with experts who have the right tools to assist you in all aspects of your business and your financial life. We extend the same services to employers, business owners, executives, employees and their families.

You might be asking yourself, “What’s the significance of integrated planning?”

Integrated planning promotes integrity in planning and ensures no stone is left unturned in your plan. Regrettably, few financial services companies implement integrated planning. Unfortunately, it’s you, the client, who suffers most. We can help.



We offer a diverse range of services and solutions including:

- Business Insurance Planning - Key-Person, Buy-Sell, Succession
- Business Consulting & Productivity – Strategic Business Consulting, Employee Productivity Programs
- Executive Compensation Planning – IRA’s, DBP, HSA’s, DPSP
- Estate and Retirement Planning
- Personal & Corporate Investment Planning - Funds, GIC’s, Portfolios
- Tax Planning
- Comprehensive Financial Plans
- Personal Risk Management - Life, Disability, Critical Illness, Long Term Care
- Creative Banking Solutions - Mortgages, Investment Loans, Credit Lines, High Yield Bank Accounts

Since 1983, we’ve been inspiring and motivating our clients to win, win, win. We’ve also been inspiring people to be proactive and live their life on purpose.

Do you have the answers you need to get you where you want to go? Feliciano Financial will partner with you to provide you with the answers you need. Contact us today and we’ll show you just how close the next level can be!



Value Audit

Let Feliciano Financial provide a Value Audit for your business; use us as a second opinion.

Our Value Audit provides you with a standard to which you can compare your benefits program to determine the competitiveness, cost effectiveness and level of service.

We'll also introduce creative ways for you to incorporate our unique approach of integrated planning services into your plan.

THE BOTTOM LINE: Let Feliciano Financial do what we do best, so you'll have more time to do what you do best.



FELICIANO

FINANCIAL GROUP

1828 Ese Loop 323 #200
Tyler, TX 75701

(903) 533-8585
www.felicianofinancial.com



Inspiring People

www.felicianofinancial.com