



WealthBuilders Financial Group, Inc
2154 Seven Springs Blvd Trinity, FL 34655
727-843-0151 • 800-249-6620

Does your Advisor offer ...

	<u>Yes</u>	<u>No</u>	<u>Not Sure</u>
◆ Comprehensive Financial Planning?	—	—	—
◆ Services as an Investment Advisor Representative?	—	—	—
◆ Advice that Can Potentially Lower Your Taxes?	—	—	—
◆ Estate and Tax Planning?	—	—	—
◆ Quarterly Reviews of Your Financial Situation? (more frequently under certain circumstances)	—	—	—
◆ Securities Investor Protection Corporation (a Broker Dealer who is a member of SIPC)	—	—	—
◆ A Representative who is a Certified Financial Planner™ Professional?	—	—	—
◆ Specialties in Retirement Distributions?	—	—	—
◆ A Firm Managing Assets over \$80 Million?	—	—	—
◆ Affiliated with an independent Broker Dealer?	—	—	—
◆ Over 33 Years of Financial Experience?	—	—	—
◆ Relationship With Other Professionals, i.e., CPA's Attorneys & Stockbrokers To Coordinate All Financial Areas?	—	—	—
◆ A Registered Representative and Registered Principal?	—	—	—

James M. Noto, CFP® qualifies YES to all of the above! If you've checked "no" to any of the above, you need to come in for a financial check-up! Please remember procrastination and mistakes could be COSTLY!

2154 Seven Springs Blvd, Trinity FL 34655
Tel (727) 843-0151 | Fax (727) 375-7781 | jnoto@IFGrr.com |