



Promotion

San Francisco Financial

As Seen In... Forbes, June 28, 2010

McKinley Financial Group

You Can Have It All

McKinley Financial Group believes this: You can have it all—independence, as well as sophisticated plans to minimize your taxes, potentially help grow your investments and maximize the wealth transferred to your children.

Obviously, that is easier said than done. But Troy Collins*, RFC, president of McKinley Financial Group, an independent planning firm in Redwood Shores, California, says McKinley can deliver it all by utilizing alternative investments and tax-smart strategies to wring out investment inefficiencies. "Our plans are very sophisticated but easy to understand," says Collins, "and designed to help our clients pursue their goals and stay within their risk tolerance."



McKinley Financial Group brings sophisticated, new economy planning down to earth.

"Because of the increased correlations between asset classes and the prevalence of relatively low interest rates, we don't believe a traditional asset-allocation based model will be effective in protecting family wealth in the new economy," adds Chartered Financial Analyst Karl Steinbrecher.* "Real risk is doing the same thing you have always done. It simply won't work today. That's why we prefer a results-based model that seeks to remove new economy risks from a family's portfolio."

"Many of my clients come to me with a high degree of financial frustration," says Timothy Connor, Ph.D., an experienced Pension Consultant to McKinley Financial Group. "They are intelligent, successful people who have had it with plans they cannot really understand." Dr. Connor thinks that you should be able to explain your own financial plan to a friend or family member in five minutes or less. If you can't, the fault is not with you, he says, but with your financial plan.

Unique Approach

The McKinley Financial Group prides itself in designing an approach that is tailored for clients by taking ideas that used to be available only for the ultra-wealthy or large corporations and sharing them with its clients.

For example:

Tax Deductions: Employer-sponsored benefits are common in larger firms, but few planners understand how to make them work for small businesses, self-employed individuals and even retired people. "We are fortunate to work with Dr. Connor," says Collins. "He has established plans that allow our clients to tax deduct \$100,000 or more per year and use the deductions for life insurance, medical coverage and other benefits."

Real Estate: Traditionally, financial planners have either discouraged real estate investments or told the clients to handle such investments themselves. "We think just the opposite," explains Collins. "Real estate is a favorite and can be a suitable asset for many people. Our focus, however, isn't purchasing real estate, but helping clients make it an even better investment by showing them how to maximize growth, reduce taxes or turn rents into a tax-free income stream."

Alternative Investments: McKinley provides clients access to assets that used to be available only to large corporations and endowments of the world. As Steinbrecher puts it, "We have sought out modernized distribution of these asset classes for our clients."

Estate Planning: "Most clients," Connor says, "derive significant satisfaction from seeing that they can leave a lasting legacy to their children and/or their community. We need to be smart about investments today to not lose our clients' wealth later to taxes."

McKinley Financial Group works directly with select clients who value simplicity in their financial plans and who have levels of income and/or assets that are significant enough to generate high taxes and wealth transfer concerns.

**Registered representative offering securities through First Allied Securities, Inc. A registered broker/dealer member FINRA/SIPC. Investment advisor representative offering services through First Allied Advisory Services, Inc. CA Insurance License #0B96613*

Dr. Timothy Connor is not affiliated with McKinley Financial Group or First Allied Securities, Inc.



555 Twin Dolphin Drive
Redwood Shores, CA 94065
650-551-8900
www.mkfinancial.com

1031 Exchange Strategies Downsizing Maximizing Income Maximizing Growth TICs (Tenants in Common)
Tax Strategies Comprehensive Financial Planning Retirement Planning Tax Advantaged Investments Portfolio Analysis
Portfolio Management Real Estate Portfolio Review and Analysis Business Owner Strategies