A Partner with Proven Expertise

Auri Elan Financial Group (Auri Elan) is an independent full-service wealth management firm specializing in providing comprehensive and objective investment consultation, financial and insurance planning to individual investors, companies, select group of affluent families and entrepreneurs. Auri Elan consists of four divisions: Auri Elan Financial, Auri Elan Insurance, Auri Elan Retirement Plans, and Yillionaire Family Office.

Auri Elan was founded on the principles of Expertise, Loyalty, Independence, Tenacity, and Enthusiasm (ELITE). The mission of Auri Elan is *to help our clients achieve their financial goals and dreams by providing sound unbiased advice, exceptional personal service, and high quality suitable investments and insurance while working diligently in their best interests at all times*.

At Auri Elan, we understand the unique challenges that come with managing wealth. We have served as a trusted partner of individuals and families, providing wealth management guidance and solutions based on a thorough understanding of each client's situation and goals.

We bring proven expertise to bear on every aspect of a client's wealth: from accumulation and growth through preservation and distribution. By taking an objective and proactive approach that reflects the nuances and complexities of each situation, we continue to build trusted relationships.

This brochure is for informational purposes only and is not intended to and does not provide legal, tax, or investment advice.

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Looking for a wealth adviser who is committed to high standards?

Wealth Management Built on Integrity and Experience

Auri Elan
The Spirit of Investing

The Power of a Holistic Approach

Recognizing that no two clients are alike, we take the time to listen and understand your particular needs, goals, and vision. This understanding serves as the basis from which we develop an integrated plan that addresses every facet of your wealth. Our comprehensive approach is designed to create a plan that achieves your near- and long-term goals, whether you are seeking fundamental investment management, need to ensure the orderly succession of ownership for a family business, are providing care for an aging family member, or are looking to establish a philanthropic legacy that makes a difference in your community.

When crafting an integrated wealth management plan, we draw on our expertise in the following areas:

- Financial planning
- Retirement income planning
- Estate planning
- Tax planning
- Business succession
- Intergenerational wealth transfer
- Philanthropy

Investment Management: Institutional Thinking for Individual Investors

We believe that individuals and families with significant wealth can benefit from the rigor and sophistication that typically characterize institutional portfolio management. Our approach to managing client assets is rooted in the following core strengths:

Deep understanding. Before we invest any money, we determine a client's goals, tolerance for risk, and time horizon. Only then do we consider asset allocation and diversification.

Disciplined Portfolio Construction. Based on the specifics of each client's situation, we provide exposure to an appropriate mix of traditional and nontraditional assets. We also seek to provide diversification within each asset class—across sectors, industries, and countries.

Rigorous oversight. When implementing a client's investment strategy, we use a stringent process to screen possible investment solutions, selecting those that meet the objectives established for the client. Once the appropriate managers have been chosen, we provide ongoing oversight and make changes as necessary.

It Starts with a Conversation

To learn how you can benefit from wealth management based on integrity and experience, please contact us at 617-329-1185 or richard.suder@lpl.com.

Why Our CFA Credential Matters

Today's financial markets demonstrate the importance of having reliable evidence of your financial adviser's integrity, experience, and commitment. Among the credentials that financial professionals may hold, none are more highly regarded than or as rigorously focused on investment knowledge as the Chartered Financial Analyst® designation. Richard Suder, President of Auri Elan Financial, is a CFA charterholder and embodies the following core tenets:

Ethics. Every CFA charterholder is required to annually sign a statement declaring adherence to the CFA Institute Code of Ethics and Standards of Professional Conduct.

Knowledge and Experience. Every CFA charterholder has at least four years of industry experience and has passed 18 hours of rigorous examinations.

Global Relevance. The CFA charter has become the global professional investment credential. There are CFA charterholders in more than 130 countries, with increasing demand worldwide for the CFA program.

Recognition. *The Economist* has called the CFA credential the "gold standard" of the investment industry.

Learn more at CFAInstitute.org