Why Choose Auri Elan Financial Group?

Richard Suder,
CFA, CFP®, ChFC,
CLU, CRPS, AAMS
President

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 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.

Auri Elan consists of four divisions: Auri Elan Financial, Auri Elan Insurance, Auri Elan Retirement Plans, and Yillionaire Family Office. Auri Elan is affiliated with LPL Financial – one of the nation's leading diversified financial services companies and the largest independent broker/dealer supporting more than 12,000 financial advisors nationwide as reported in *Financial Planning* magazine 1996-2009, based on total revenues. As an independent insurance agency, we represent a carefully selected group of financially sound, reputable insurance companies to offer you a variety of coverage choices for your Auto, Home, Life, Health, and Business insurance needs. We will customize a plan that provides the protection you need and place your policy with the company offering the best coverage at the most competitive price.

Independence and Open Platform

Auri Elan has no conflicts of interest imposed by the constraints of proprietary products, investment banking relationships or other activities that may be inconsistent with your interests. Auri Elan has no "hidden agenda" or motive to recommend any particular financial product. Auri Elan truly puts the interests of our clients first. As independent advisors we have access to thousands of mutual funds, ETFs and alternative investments. We work with our clients to determine which investment options are best suited to their unique financial situation.

Unbiased Investment Advice

Through affiliation with LPL Financial, Auri Elan is backed by the largest in-house research team of any independent broker/dealer. As the leading independent brokerage firm, LPL offers no proprietary products, investment banking business, or any other conflicts that can get in the way of providing independent, objective and unbiased investment research. Auri Elan thoroughly analyzes theses Research Reports and only selects investments that are best suited to our client's needs.

Knowledge and Expertise

Richard Suder has a scientist background, a MBA degree, and over 5 years of professional experience. He also holds various prestigious professional designations in the financial planning field including Chartered Financial Analyst (CFA), Certified Financial Planner (CFP®), Chartered Financial Consultant (ChFC), Chartered Life Underwriter (CLU), Chartered Retirement Plan Specialist (CRPS), and Accredited Asset

Management Specialist (AAMS). Richard is also a member of CFA Institute, Boston Security Analysts Society (BSAS), and Hartford CFA Society.

Comprehensive Oversight

Auri Elan believes it is important to take a holistic approach to financial planning and aims to manage all aspects of our client's financial situation. Auri Elan provides clients advice on investment planning, retirement planning, insurance planning, education planning, estate planning and etc. If necessary, we will consult with our trusted affiliates including local CPA firms and attorneys and coordinate with our clients' other financial and estate professionals to develop and implement integrated solutions.

Competitive Hybrid Fee Structure

Auri Elan offers clients a hybrid model to pay for services most cost-effectively: (1) "Commission Based" where buy-and-hold clients pay based on transactions; (2) "Fee Based" where active clients pay based on asset under management. Clients can select commission-based, fee-based, or a combination of the two based on their objectives, risk tolerance, time horizons, investment styles and etc.

Exceptional Personal Service

Auri Elan takes pride in offering exceptional client service. Auri Elan strives to foster long-term relationships with clients and is committed to answering their questions and concerns within 24 hours. Since financial planning is an on-going, dynamic process, Auri Elan offers clients periodic face-to-face appointment (or online meeting *via* Adobe ConnectNow) and portfolio rebalancing. As your needs change, recommended investment strategy will also be changed to meet your current financial situation.

At Auri Elan, we are committed to provide our clients ample personal attention and exceptional service. Unlike many other wealth management firms, we do not have an absolute minimum in Dollars to decide whether you are qualified to be a client. Instead, we value trust, loyalty, and responsibility a lot more. We highly recommend clients to reach a household portfolio of $250,000 or more in one year. Please call or email us for a complimentary portfolio review, we will both know when we are a fit to each other. We greatly appreciate the opportunity to demonstrate how Auri Elan will make a difference in your finance and life.

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